DOCUMENT RESUME

ED 058 615 80 EA 003 917

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TITLE The State Education Agency. A Handbook of Standard Terminology and a Guide for Recording and Reporting Information About State Education Agencies. State Educational Records and Reports Series: Handbook VII.
INSTITUTION Kentucky State Dept. of Education, Frankfort.; National Center for Educational Statistics (DHEW/OE), Washington, D.C.
REPORT NO OE-23054
PUB DATE [71]
NOTE 180p.
AVAILABLE FROM Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402 (Stock Number 1780-0822, $1.75)

EDRS PRICE MF-$0.65 HC-$6.58
DESCRIPTORS Consultants; Educational Planning; Equipment; *Guides; Information Processing; Management; Personnel Data; *State Agencies; *State Departments of Education; *Vocabulary
IDENTIFIERS Elementary Secondary Education Act Title V; ESEA Title V

ABSTRACT

This handbook is one of a series to facilitate and improve the collection, maintenance, and reporting of educational information. As a guide for recording and reporting information about State education agencies, this handbook defines and provides classifications of terms concerned with State education authorities, their personnel, and their property; and State education departments, their functions, personnel, property, and financial operations. Standard nomenclature is used so that more easily comparable data may be obtained. The guide will assist State agencies to communicate more clearly and effectively with their publics, their legislative bodies, and their educational organizations. (Author)

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SPECIAL GRANT UNDER TITLE V, SECTION 505, OF THE ELEMENTARY AND SECONDARY EDUCATION ACT OF 1965, P.L. 89-10, AS AMENDED

Support for committee and review conference activities provided under "Project to Assist in the Support of the Cooperative Development of a Handbook on State Education Agency Information." The Kentucky State Department of Education was the coordinating agency.

ED 058615

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State Educational Records
and Reports Series:

Handbook VII

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OE-23054

THE STATE EDUCATION AGENCY

A HANDBOOK OF STANDARD TERMINOLOGY AND A GUIDE FOR RECORDING AND REPORTING INFORMATION ABOUT STATE EDUCATION AGENCIES

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EA 003 917

For sale by the Superintendent of Documents, U.S. Government Printing Office
Washington, D.C. 20402 - Price $1.75
Stock Number 1780-0822

Contents

Page

Foreword v

Acknowledgments vi

Chapter 1. Introduction 1

Purpose of the handbook; the extent to which information should be maintained; criteria for selection of items of information; handbook series; benefits of standardized information about State education agencies; State government and State education agencies; programs of State education agencies; condensed outline of items of information.

Chapter 2. Classification of Items of Information About State Education Agencies 4

Coding structure for items of information; illustrations of the coding structure; programs by level; specific programs; use of columns; identification and functions of State education authority; functions of State departments of education; personnel of State education authority and State department of education; property utilized by State education authority and State department of education.

Chapter 3. Financial Aspects 62

Balance sheet accounts; classification of revenues; the multidimensional approach to recording expenditures; illustrative coding structure for expenditures; illustrations of coding for selected expenditures.

Chapter 4. Definitions of Items of Information About State Education Agencies 84

Identification and functions of State education authority; functions of State departments of education; personnel of State education authority and State department of education; property utilized by State education authority and State department of education.

Glossary 139

Index 156

Foreword

The State Education Agency is a handbook devoted to the work of the State instrumentalities which serve as trustees of American education. State education agencies have many and varied responsibilities. They are the fulcrum in the American system of education; their effectiveness determines, in good measure, educational progress and change.

This handbook is the seventh in the *State Educational Records and Reports Series.* It was cooperatively planned and developed by representatives of the States and the U.S. Office of Education in response to a resolution of the Council of Chief State School Officers and in response to the need to clearly recognize the significance of the State in the American educational system.

Each of the earlier handbooks in the *State Educational Records and Reports Series,* with the exception of a limited section of the *Common Core of Educational Information* (Handbook I) which was published nearly twenty years ago, concentrated on the terminology and definitions applicable to a specific aspect of local education agencies. The earlier handbooks have been invaluable as basic references. This handbook, devoted to the work of State education agencies, is intended to comprehensively reflect the broad responsibilities of these agencies, current and future. It is not meant to be an anchor, fixing the past to the present nor the present to the future. It is flexibly structured and can accommodate change at the State level over a reasonable period of time. Appropriate revision will undoubtedly be necessary in order to keep abreast of the emerging responsibilities of State education agencies.

The Council of Chief State School Officers, the U.S. Office of Education, National Center for Educational Statistics, and the Bureau of Elementary and Secondary Education, Division of State Agency Cooperation, jointly supported the development of the handbook. The Kentucky State Department of Education served as coordinator on behalf of all the States. The project was formally initiated in March 1969 when all Chief State School Officers were informed of the undertaking and requested to designate a State liaison.

In April 1969, a national Technical Committee was established. This committee, having both advisory and technical functions, was selected on the basis of recommendations made by the Planning Committee of the Council of Chief State School Officers Committee on Educational Data Systems, the Kentucky State Department of Education, and the U.S. Office of Education. This eight-member Technical Committee and the U.S. Office of Education staff assigned to the project began development of the handbook in April 1969.

The first meeting of the Technical Committee was held in Lexington, Kentucky, on May 14, 15, and 16, 1969. Preliminary or First Draft materials prepared by the project staff were reviewed and the Committee made recommendations for the structure and content of the handbook. A second meeting of the Technical Committee was held in Denver, Colorado, from September 29 through October 1, 1969, to review Second Draft materials which incorporated revisions decided upon at the first meeting. Recommendations were made for modifications in the Second Draft and additions to be included in the Third Draft. A schedule of regional conferences was agreed upon.

Five regional conferences were held during the months of January, February, and March, 1970, in the following locations: Atlanta, Georgia; Austin, Texas; Portland, Oregon; Albany, New York; and St. Paul, Minnesota. During the three-day conferences the Third Draft of the handbook was reviewed in detail by the State conferees present and changes to be included in the Fourth Draft were recommended. A member of the project Technical Committee served as chairman in each of the conferences.

On March 30 and 31, 1970, the Technical Committee met in Louisville, Kentucky, to consider all State recommendations made in the five regional conferences and to decide which of the recommended changes were to be incorporated in the Fourth Draft. In addition, the Committee agreed upon the next steps to be taken in the project.

The Fourth Draft was prepared in preliminary form by the project staff and presented to the Technical Committee at its fourth meeting in Diamond Point, New York, on June 16, 17, and 18, 1970. Final decisions were made concerning the content of the Fourth Draft. It was recommended by the Committee that the Fourth Draft be printed and distributed to all State representatives prior to the national conference.

The national conference was held in Scottsdale, Arizona, on December 2, 3, and 4, 1970. Representatives of 50 States participated in the regional conferences and the national conference where the contents of the handbook were determined.

Acknowledgments

Development of this handbook was possible through the efforts of many people. It is obviously impossible to list the name of each person who made an important contribution. The organizations and people listed below, however, deserve special recognition.

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The Council of Chief State School Officers, the Kentucky State Department of Education, the National Association of State Boards of Education, and the Education Commission of the States.

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Chapter 1

Introduction

Purpose of the Handbook

This handbook is a guide for recording and reporting information about State education agencies. It classifies and defines terms concerned with State education authorities, the functions of State departments of education, the personnel and property of State education authorities and State departments of education, and the financial operations of State departments of education.

It provides for standardization of items of information and the identification of these items by standard nomenclature so that data more precisely comparable may be obtained. It will therefore permit the State agencies to communicate more clearly and effectively with their publics, their legislative bodies, and their educational organizations.

The Extent to Which Information Should be Maintained

The extent to which items of information should be collected and maintained is determined by the responsibilities of the State agency of each particular State. It is recognized that some State education agencies will not find use for all of the items identified in this handbook while others may require more items than are presented. The classification system can accommodate additional items as necessary to meet the particular needs of any State.

Criteria for Selection of Items of Information

Three basic criteria were used as guides in the selection of items included in this handbook. According to these criteria each item provides information that (1) may be required for effective management and operation of State education agencies, (2) may be used for the accurate transmission of information, and (3) may be collected and maintained by State education agencies with a reasonable degree of effort.

Handbook Series

This handbook is one of a series of handbooks developed cooperatively to facilitate and improve the collection, maintenance, and reporting of educational information. Handbook I, *The Common Core of State Educational Information,* was published in 1953. It was followed by Handbook II, *Financial Accounting for Local and State School Systems,* in 1957; Handbook III, *Property Accounting for Local and State School Systems,* in 1959; Handbook IV, *Staff Accounting for Local and State School Systems,* in 1965; Handbook V, *Pupil Accounting for Local and State School Systems,* in 1964; and Handbook VI, *Standard Terminology for Curriculum and Instruction in Local and State School Systems,* in 1970.

The major portion of the content of the earlier handbooks pertains to the operational aspects of local education agencies. The items in the seven handbooks are interrelated. Many of the definitions of terms in this handbook have been taken from other handbooks in the series; other definitions have been modified or expanded as appropriate to State education agencies.

Benefits of Standardized Information About State Education Agencies

The universal use of the terminology in this handbook can improve the quality of education by facilitating research, realistic planning, efficient operation, and meaningful evaluation of educational systems throughout the United States. It can result in improvement in such areas as organization, management, provision of services, allocation of resources, utilization of personnel, and provision of facilities.

The terminology contained in this handbook provides a plan according to which information about State education agencies can be recorded, reported, and studied, and it permits records and reports to be prepared with greater speed, accuracy, and flexibility.

Another benefit is that standardized items of information recorded or processed manually may be readily compared and combined with the same items of information processed by machine. Furthermore, the use of standardized items of information is essential to the orderly and efficient conversion from manual to machine processing. In such a conversion, the adoption of standard classifications and terminology is a necessary first step, whether the State

education agency plans to initiate or extend machine processing for an individual aspect of its operation or for the entire range of its operations.

State Government and State Education Agencies

Information about State education agencies has historical and evolutionary origins in the American system of government and education. Education, not mentioned in the Federal Constitution, is by judicial interpretation a direct responsibility of the States where consonant with the Federal Constitution. Most State Constitutions contain educational provisions and, where States do not have constitutional provisions for education, State legislative acts have an equal effect. State education agencies have been created to fulfill prescribed educational responsibilities at the State level.

Historically, education in the United States was originally a necessary function of local governmental units; but as the nation developed, the need for statewide coordination and national support became evident. Since 1900 the general trend in the execution of State education responsibility has been a strengthening of the functions of State education agencies and the assignment of broader educational leadership to those agencies. State education agencies now perform a central function in determining the direction and quality of American education.

In all States the State education authority, along with its component agencies, is recognized as an essential element of the State government. The most common education authority is the State board of education, but a variety of other education agencies and other governmental agencies also have educational jurisdiction in one or more specific educational areas. The execution of policies made by the education authority is generally the responsibility of the State department of education, headed by an executive officer (chief State school officer), though other executing agencies are not uncommon.

Programs of State Education Agencies

State education agencies are entrusted with a wide variety of functions. These functions are manifest in the general and specific programs carried out by the agencies. General programs relating to such levels as elementary and secondary education and such programs as certification and distribution of financial resources to local education agencies are usually continuing programs and are common to most States. In addition to the general programs, State education agencies develop many specific programs which are often designed to reach a definite objective within a specific period of time. Both general programs and specific programs should include provisions for discrete accountability. This handbook should aid in the systematic recognition of State educational programs and the resources devoted to them.

Condensed Outline of Items of Information

An abbreviated classification of information about State education agencies is presented below. The full classification of items is presented in chapter 2, and the definitions are presented in chapter 4.

02.00 00 00 00 **IDENTIFICATION AND FUNCTIONS OF STATE EDUCATION AUTHORITY**

02.01 00 00 00 IDENTIFICATION OF STATE EDUCATION AUTHORITY
02.02 00 00 00 FUNCTIONS OF STATE EDUCATION AUTHORITY

03.00 00 00 00 **FUNCTIONS OF STATE DEPARTMENTS OF EDUCATION**

03.01 00 00 00 GENERAL MANAGEMENT
03.02 00 00 00 PLANNING, RESEARCH, DEVELOPMENT, AND EVALUATION
03.03 00 00 00 CONSULTATIVE SERVICES
03.04 00 00 00 DISTRIBUTION OF RESOURCES
03.05 00 00 00 INTERNAL SERVICES
03.06 00 00 00 OPERATION OR APPROVAL OF PROGRAMS AND SCHOOLS

04.00 00 00 00 **PERSONNEL OF STATE EDUCATION AUTHORITY AND STATE DEPARTMENT OF EDUCATION**

04.01 00 00 00 PERSONAL IDENTIFICATION INFORMATION
04.02 00 00 00 ASSIGNMENT CLASSIFICATION

04.03 00 00 00	SCOPE OF ASSIGNMENT CLASSIFICATION
04.04 00 00 00	GROUP ASSIGNMENT CLASSIFICATION
04.05 00 00 00	FAMILY AND RESIDENCE INFORMATION
04.06 00 00 00	HEALTH INFORMATION
04.07 00 00 00	PRIOR SERVICE OR EMPLOYMENT INFORMATION
04.08 00 00 00	CURRENT SERVICE OR EMPLOYMENT INFORMATION
04.09 00 00 00	EDUCATIONAL BACKGROUND AND CREDENTIAL INFORMATION
04.10 00 00 00	OTHER EDUCATION OR TRAINING, ORGANIZATIONAL MEMBERSHIPS, TRAVEL, AND AVOCATIONAL INFORMATION
04.11 00 00 00	TERMINATION OF SERVICE OR EMPLOYMENT, LEAVE, RETIREMENT, AND INSURANCE INFORMATION
04.12 00 00 00	PERFORMANCE INFORMATION

05.00 00 00 00	**PROPERTY UTILIZED BY STATE EDUCATION AUTHORITY AND STATE DEPARTMENT OF EDUCATION**
05.01 00 00 00	SITE IDENTIFICATION
05.02 00 00 00	BUILDING IDENTIFICATION
05.03 00 00 00	EQUIPMENT

Chapter 2

Classification of Items of Information About State Education Agencies

This chapter outlines the classification of information pertaining to State education authority, functions of State departments of education, and personnel and property of State education authorities and State departments of education. Chapter 4 defines the various items. The page on which the definition is presented is indicated in chapter 2 in the column headed *Def. page no.*

Information pertaining to the finances of State departments of education is presented in chapter 3, *Financial Aspects.* In this chapter illustrations are offered to demonstrate how financial information can be related to important dimensions, including the items of information in chapter 2 which pertain to the functions of State departments of education.

Coding Structure for Items of Information

The 10-digit coding system used in chapters 2 and 4 has been designed to accommodate the items of information classified and defined in this handbook. Within the coding system each item of information has been assigned a unique number and provision is made for additional items and their code numbers.

Each **MAJOR CLASSIFICATION** of information is identified by the number in the 2-digit position to the left of the decimal point. Within each **MAJOR CLASSIFICATION** there are four subclassifications which occupy the four 2-digit positions to the right of the decimal point. These four 2-digit positions are intended to provide for four descending levels of detail within the **MAJOR CLASSIFICATION.** A coding of "99" in any of the four positions to the right of the decimal point signifies the end of the range of a particular level of detail.

A 10-digit code, therefore, identifies each item numerically within a major classification of information. Two additional aids have been provided to distinguish items: 1) the varied typography of the item classifications indicates the level of detail of the item, and 2) the indentation in this chapter signifies a particular level of detail.

The 10-digit coding system was designed specifically for use in this handbook. Some features of the system, however, may be adapted for use in either manual or machine data processing procedures.

Illustrations of the Coding Structure

The general illustration which follows is intended to explain some of the characteristics of the coding structure.

General Coding Structure

00.	**MAJOR CLASSIFICATION**
00.00	FIRST LEVEL OF DETAIL (Principal Segment of Major Classification)
00.00 00	**Second Level of Detail** (Division of Principal Segment of Major Classification)
00.00 00 00	*Third Level of Detail* (First Level of Detail of Division of Principal Segment of Major Classification)
00.00 00 00 00	Fourth Level of Detail (Second Level of Detail of Division of Principal Segment of Major Classification)

The following examples demonstrate the coding structure as used in this chapter.

Example A.

03.00 00 00 00	**FUNCTIONS OF STATE DEPARTMENTS OF EDUCATION**
03.03 00 00 00	CONSULTATIVE SERVICES
03.03 02 00 00	**Instructional Consultative Services**
03.03 02 03 00	*Subject Matter Areas*
03.03 02 03 01	Agriculture

Example B.

04.00 00 00 00	**PERSONNEL OF STATE EDUCATION AUTHORITY AND STATE DEPARTMENT OF EDUCATION**
04.09 00 00 00	EDUCATIONAL BACKGROUND AND CREDENTIAL INFORMATION
04.09 01 00 00	**Highest Level of Education Completed**
04.09 01 02 00	*College Work Completed*
04.09 01 02 09	Doctor's Degree

Example C.

05.00 00 00 00	**PROPERTY UTILIZED BY STATE EDUCATION AUTHORITY AND STATE DEPARTMENT OF EDUCATION**
05.01 00 00 00	SITE IDENTIFICATION
05.01 02 00 00	**Use of Site**
05.01 02 11 00	*Parking*
05.01 02 11 02	Public

Programs by Level

In many cases it is desirable to relate an item of information to an instructional level. This relationship is indicated in this chapter by the column *Programs by Level* together with the 2-digit key referring to four broad instructional levels. Each item of information, therefore, may be coded as applying to an instructional level or, where an item of information is applicable to more than one instructional level, it may be coded as undistributed. The coding suggested for instructional levels provides for any further additions or subdivisions as may be appropriate. For instance, if a "Middle School" level is applicable, it could be coded as 20 between "Elementary" and "Secondary."

As used in this handbook, the four broad instructional levels are coded and defined as follows:

10 *Elementary*—Includes education in the prekindergarten, kindergarten, and years or grades 1 through 6, 7, or 8. The terminal elementary year or grade (6, 7, or 8) is usually determined by State law or regulation.

30 *Secondary*—Includes education provided in any span of years or grades beginning with the next year or grade following the elementary school and ending with or below grade 12, including the junior high school and other types of high school.

50 *Postsecondary*—Instruction and training programs provided for students who have graduated from a secondary school. This instructional level includes college programs of one or more years duration and other programs designed to meet the unique needs of youths and adults who wish to pursue a specified educational objective as a continuation of their formal education.

70 *Adult Education*—Instruction designed to meet the unique needs of adults and youth—beyond the age of compulsory school attendance—who have either completed or interrupted their formal education. This may be provided by a school system, college, or other agency or institution (including a technical institute or area vocational school) through activities and media such as formal classes, correspondence study, radio, television, lectures, concerts, demonstrations, and counseling. Adult education, like other "program levels," is not necessarily mutually exclusive. For example, adult basic education is primarily education at the elementary level.

90 *Undistributed*—The designation of any item of information which cannot be specifically related to a particular program level.

Specific Programs

For purposes of this handbook, a program is defined as a major agency endeavor, mission oriented, which fulfills statutory or executive requirements, and which is defined in terms of the principal actions required to achieve a significant objective.

Many State education agencies have developed, or are developing, systems for planning, programing, budgeting, and evaluation. This handbook recognizes the importance of developing, operating, and evaluating specific programs that can be expected to meet purposes or goals. Specific programs should be included, as appropriate, in the State education information system. Chapter 3 provides for allocating costs to specific programs when appropriate. For this purpose, code numbers 01 through 99 may be used as applicable.

The identification, classification, and definition of specific programs is beyond the purview of this handbook. Programs should be designated as needed by an agency at any given time.

Use of Columns

The columnar arrangements in this chapter are provided as illustrative aids to the development of a record system for items of information applicable to State education agencies. The key accompanying each of the three different columnar arrangements pertains to the respective column headings.

02. SERIES

IDENTIFICATION AND FUNCTIONS OF STATE EDUCATION AUTHORITY

	Classification of Items of Information	Def. Page No.	Programs: By Level	Programs: Specific P_{01}–P_{99}
02.00 00 00 00	**IDENTIFICATION AND FUNCTIONS OF STATE EDUCATION AUTHORITY**	84		
02.01 00 00 00	IDENTIFICATION OF STATE EDUCATION AUTHORITY	84		
02.01 01 00 00	**State Education Agencies**	84		
02.01 01 01 00	*State Board of Education*	84		
02.01 01 02 00	*State Board for Vocational Education*	84		
02.01 01 03 00	*State Board for Higher Education*	84		
02.01 01 99 00	*Other State Education Agencies*	84		
02.01 02 00 00	**Other State Governmental Agencies Having Educational Functions**	84		
02.01 02 01 00	*State Board for Vocational Rehabilitation*	85		
02.01 02 02 00	*State Health Board or Commission*	85		
02.01 02 03 00	*State Welfare Board or Commission*	85		
02.01 02 04 00	*State Labor Board or Commission*	85		
02.01 02 99 00	*Other: Other State Governmental Agencies Having Educational Functions*	85		
02.01 99 00 00	**Other Identification of State Education Authority**	85		

KEY

Programs by Level: See pages 5-6 for definitions

10–Elementary
30–Secondary
50–Postsecondary
70–Adult Education
90–Undistributed

Programs: Specific (P_{01} – P_{99}) – As designated by State Education Agency

	Classification of Items of Information	Def. Page No.	Programs: By Level	Programs: Specific P01-P99
02.02 00 00 00	FUNCTIONS OF STATE EDUCATION AUTHORITY	85		
02.02 01 00 00	**Functions of State Education Agencies**	85		
02.02 01 01 00	*Activities of State Board of Education*	85		
02.02 01 01 01	Development of Policies on Agency Role and Function	85		
02.02 01 01 02	Development of Policies on Educational Program	85		
02.02 01 01 03	Development of Policies on School District Organization	85		
02.02 01 01 04	Development of Policies on Pupils	85		
02.02 01 01 05	Development of Policies on School Personnel	85		
02.02 01 01 06	Development of Policies on School Buildings and Sites	85		
02.02 01 01 07	Development of Policies on Relationship with the Public, Other Agencies, and Institutions	86		
02.02 01 01 08	Development of Policies on Finance	86		
02.02 01 01 09	Development of Policies on State Education Agency Employment Practices	86		
02.02 01 01 50	Negotiations	86		
02.02 01 01 51	Judiciary	86		
02.02 01 01 52	Budget Review	86		
02.02 01 01 53	Evaluation	86		
02.02 01 01 99	Other Activities of State Board of Education	86		

For KEY, see p. 7.

Classification of Items of Information		Def. Page No.	Programs	
			By Level	Specific P01-P99
02.02 01 02 00	*Activities of State Board for Vocational Education*	86		
02.02 01 03 00	*Activities of State Board for Higher Education*	86		
02.02 01 99 00	*Other Functions of State Education Agencies*	86		
02.02 02 00 00	**Functions of Other State Governmental Agencies Having Educational Functions**	86		
02.02 02 01 00	*Activities of State Board for Vocational Rehabilitation*	86		
02.02 02 02 00	*Activities of State Health Board or Commission*	87		
02.02 02 03 00	*Activities of State Welfare Board or Commission*	87		
02.02 02 04 00	*Activities of State Labor Board or Commission*	87		
02.02 02 99 00	*Other Functions of Other State Governmental Agencies Having Educational Functions*	87		
02.02 99 00 00	**Other Functions of State Education Authority**	87		

For KEY, see p. 7.

22

03. SERIES

FUNCTIONS OF STATE DEPARTMENTS OF EDUCATION*

Classification of Items of Information		Def. Page No.	Programs	
			By Level	Specific P01–P99
03.00 00 00 00	**FUNCTIONS OF STATE DEPARTMENTS OF EDUCATION***	87		
03.01 00 00 00	GENERAL MANAGEMENT	87		
03.01 01 00 00	**Activities of Office of Chief Executive Officer**	87		
03.01 01 01 00	*Policy Development*	87		
03.01 01 02 00	*Policy Implementation*	87		
03.01 01 03 00	*Internal Coordination*	87		
03.01 01 04 00	*Coordination with Other State Agencies*	88		
03.01 01 05 00	*Coordination with Nongovernmental Agencies*	88		
03.01 01 06 00	*State-Federal Relations*	88		
03.01 01 07 00	*State-Local Relations*	88		
03.01 01 08 00	*Interstate Relations*	88		
03.01 01 09 00	*Public Relations*	88		
03.01 01 10 00	*Human Rights*	88		
03.01 01 11 00	*Legislative Liaison*	88		
03.01 01 12 00	*Personnel Negotiations*	88		
03.01 01 13 00	*Judiciary*	88		
03.01 01 99 00	*Other Activities of Office of Chief Executive Officer*	88		

*The 03 Series may also be used to classify the functions of other State education agencies and other State governmental agencies having educational functions.

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs	
			By Level	Specific P01-P99
03.01 02 00 00	**Activities of Office of Deputy or Assistant Chief Executive Officer (when not chargeable to other functions)**	88		
03.01 03 00 00	**Developing State Agency Staff Competencies**	89		
03.01 03 01 00	*Preservice Orientation and Training*	89		
03.01 03 02 00	*Professional Leave*	89		
03.01 03 03 00	*Fellowships, Internships, and Traineeships*	89		
03.01 03 04 00	*Institutes, Workshops, Conferences, and Special Courses*	89		
03.01 03 99 00	*Other Programs to Develop State Agency Staff Competencies*	89		
03.01 99 00 00	**Other General Management**	89		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs: By Level	Programs: Specific P01-P99
03.02 00 00 00	PLANNING, RESEARCH, DEVELOPMENT, AND EVALUATION	89		
03.02 01 00 00	**Management of Planning, Research, Development, and Evaluation**	89		
03.02 02 00 00	**Planning**	89		
03.02 02 01 00	*Interagency*	89		
03.02 02 02 00	*Intra-agency*	89		
03.02 02 99 00	*Other Planning*	89		
03.02 03 00 00	**Research**	90		
03.02 03 01 00	*Comprehensive Research (Other Than Curriculum)*	90		
03.02 03 02 00	*Specific Research (Other Than Curriculum)*	90		
03.02 03 02 01	State Education Agency Programs	90		
03.02 03 02 02	Legal and Organizational Structure	90		
03.02 03 02 03	Administration and Management	90		
03.02 03 02 04	Financing	90		
03.02 03 02 05	School Facilities	90		
03.02 03 02 06	Pupil Achievement	90		
03.02 03 02 07	Staffing of Educational Programs	90		
03.02 03 02 99	Other Specific Research (Other Than Curriculum)	90		
03.02 03 03 00	*Curriculum Research*	90		
03.02 03 99 00	*Other Research*	90		
03.02 04 00 00	**Development**	90		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs By Level	Programs Specific P01-P99
03.02 04 01 00	*Centers for Demonstration and Innovation*	90		
03.02 04 02 00	*Dissemination of Information*	90		
03.02 04 99 00	*Other Development*	90		
03.02 05 00 00	**Evaluation**	91		
03.02 05 01 00	*Interagency*	91		
03.02 05 02 00	*Intra-agency*	91		
03.02 05 99 00	*Other Evaluation*	91		
03.02 06 00 00	**Management Information System**	91		
03.02 06 01 00	*Statistical Services*	91		
03.02 06 02 00	*Systems Analysis*	91		
03.02 06 99 00	*Other Management Information System*	91		
03.02 99 00 00	**Other Planning, Research, Development, and Evaluation**	91		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs	
			By Level	Specific P_{01}–P_{99}
03.03 00 00 00	CONSULTATIVE SERVICES	91		
03.03 01 00 00	**Management of Consultative Services**	91		
03.03 02 00 00	**Instructional Consultative Services**	91		
03.03 02 01 00	*General Area*	91		
03.03 02 01 10	Elementary	91		
03.03 02 01 30	Secondary	91		
03.03 02 01 50	Postsecondary	92		
03.03 02 01 70	Adult Education	92		
03.03 02 01 90	Other General Area	92		
03.03 02 02 00	*Differentiated Curriculum*	92		
03.03 02 02 01	Bilingual Education	92		
03.03 02 02 02	Education for the Disadvantaged	92		
03.03 02 02 03	Education for the Gifted	92		
03.03 02 02 04	Education for the Handicapped	92		
03.03 02 02 05	Migrant Education	92		
03.03 02 02 06	Urban Education	92		
03.03 02 02 99	Other Differentiated Curriculum	92		
03.03 02 03 00	*Subject Matter Area*	92		
03.03 02 03 01	Agriculture	93		
03.03 02 03 02	Art	93		
03.03 02 03 03	Business	93		
03.03 02 03 04	Distributive Education (Distribution and Marketing)	93		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs	
			By Level	Specific P01–P99
03.03 02 03 05	English (Language Arts)	93		
03.03 02 03 06	Foreign Languages	93		
03.03 02 03 07	Health Occupations Education	93		
03.03 02 03 08	Health and Safety in Daily Living, Physical Education, and Recreation	93		
03.03 02 03 09	Home Economics	93		
03.03 02 03 10	Industrial Arts	94		
03.03 02 03 11	Mathematics	94		
03.03 02 03 12	Music	94		
03.03 02 03 13	Natural Sciences	94		
03.03 02 03 14	Office Occupations	94		
03.03 02 03 15	Safety and Driver Education	94		
03.03 02 03 16	Social Sciences or Social Studies	94		
03.03 02 03 17	Technical Education	94		
03.03 02 03 18	Trade and Industrial Occupations	94		
03.03 02 03 99	Other Subject Matter Area	94		
03.03 02 04 00	*Interdisciplinary Study and Activities*	94		
03.03 02 04 01	Cocurricular Activities	95		
03.03 02 04 02	Humanities	95		
03.03 02 04 03	Environmental Education	95		
03.03 02 04 04	Occupational Exploration	95		

For KEY, see p. 7.

Classification of Items of Information		Def. Page No.	Programs: By Level	Programs: Specific P_{01}–P_{99}
03.03 02 04 05	Individualized Instruction	95		
03.03 02 04 06	Drug Education	95		
03.03 02 04 99	Other Interdisciplinary Study and Activities	95		
03.03 02 05 00	*Educational Media*	95		
03.03 02 05 01	School Library Services	95		
03.03 02 05 02	Audiovisual Services	95		
03.03 02 05 03	Textbook Services	96		
03.03 02 05 04	Demonstration Centers	96		
03.03 02 05 05	Television in Education	96		
03.03 02 05 06	Radio in Education	96		
03.03 02 05 99	Other Educational Media	96		
03.03 03 00 00	**Pupil Personnel Services**	96		
03.03 03 01 00	*Guidance*	96		
03.03 03 02 00	*Health*	96		
03.03 03 03 00	*School Psychological*	96		
03.03 03 04 00	*Speech Pathology*	96		
03.03 03 05 00	*School Attendance and Social Work*	96		
03.03 03 99 00	*Other Pupil Personnel Services*	97		
03.03 04 00 00	**Administrative Consultative Services**	97		
03.03 04 01 00	*Specialized Aspects of Organization, Administration, and Operation of Intermediate and Local Education Agencies*	97		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs	
			By Level	Specific P_{01}-P_{99}
03.03 04 01 01	District and School Organization	97		
03.03 04 01 02	Plant Facilities	97		
03.03 04 01 03	Pupil Transportation	97		
03.03 04 01 04	School Food Services	97		
03.03 04 01 05	Planning	97		
03.03 04 01 06	Evaluation	97		
03.03 04 01 07	Management Information System	97		
03.03 04 01 08	Machine Data Processing	97		
03.03 04 01 09	Fiscal Management	97		
03.03 04 01 10	Personnel Management	97		
03.03 04 01 11	Legal and Legislative	98		
03.03 04 01 99	Other Specialized Aspects of Organization, Administration, and Operation of Intermediate and Local Education Agencies	98		
03.03 04 02 00	*Developing Intermediate and Local Agency Administrative and Technical Staff Competencies*	98		
03.03 04 02 01	Preservice Orientation and Training	98		
03.03 04 02 02	Professional Leave	98		
03.03 04 02 03	Fellowships, Traineeships, and Internships	98		
03.03 04 02 04	Institutes, Workshops, Conferences, and Special Courses	98		
03.03 04 02 05	Motivational Training	98		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs: By Level	Programs: Specific P01-P99
03.03 04 02 99	Other Developing Intermediate and Local Agency Administrative and Technical Staff Competencies	98		
03.03 04 99 00	*Other Administrative Consultative Services*	98		
03.03 99 00 00	**Other Consultative Services**	98		

For KEY, see p. 7.

Classification of Items of Information		Def. Page No.	Programs	
			By Level	Specific P_{01}–P_{99}
03.04 00 00 00	DISTRIBUTION OF RESOURCES	98		
03.04 01 00 00	**Management of Distribution of Resources**	99		
03.04 02 00 00	**Financial**	99		
03.04 02 01 00	*State*	99		
03.04 02 02 00	*Federal*	99		
03.04 02 99 00	*Other Financial*	99		
03.04 03 00 00	**Material**	99		
03.04 03 01 00	*Textbooks*	99		
03.04 03 02 00	*Equipment*	99		
03.04 03 03 00	*Surplus Commodities*	99		
03.04 03 04 00	*Surplus Property*	99		
03.04 03 05 00	*Instructional Material*	99		
03.04 03 99 00	*Other Material*	99		
03.04 04 00 00	**Services**	99		
03.04 04 01 00	*Planning*	99		
03.04 04 02 00	*Evaluation*	100		
03.04 04 03 00	*Machine Data Processing*	100		
03.04 04 04 00	*Management Information System*	100		
03.04 04 04 01	Data Systems	100		
03.04 04 04 02	Statistical Services	100		
03.04 04 04 99	Other Management Information System	100		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs: By Level	Programs: Specific P01-P99
03.04 04 05 00	*Research*	100		
03.04 04 99 00	*Other Services*	100		
03.04 99 00 00	**Other Distribution of Resources**	100		

For KEY, see p. 7.

	Classification of Items of information	Def. Page No.	Programs By Level	Programs Specific P01–P99
03.05 00 00 00	INTERNAL SERVICES	100		
03.05 01 00 00	**Management of Internal Services**	100		
03.05 02 00 00	**Fiscal Management**	100		
03.05 02 01 00	*Accounting*	100		
03.05 02 02 00	*Audit*	101		
03.05 02 03 00	*Budget*	101		
03.05 02 04 00	*Mail Control*	101		
03.05 02 05 00	*Payroll*	101		
03.05 02 06 00	*Purchasing*	101		
03.05 02 07 00	*Supply*	101		
03.05 02 99 00	*Other Fiscal Management*	101		
03.05 03 00 00	**Personnel Management**	101		
03.05 04 00 00	**Property Management**	101		
03.05 05 00 00	**Legal**	101		
03.05 06 00 00	**Legislative**	101		
03.05 07 00 00	**Library—Professional**	101		
03.05 08 00 00	**Management Information System**	101		
03.05 08 01 00	*Data Systems*	102		
03.05 08 02 00	*Statistical Services*	102		
03.05 08 99 00	*Other Management Information System*	102		
03.05 09 00 00	**Machine Data Processing**	102		
03.05 10 00 00	**Graphic Arts**	102		

For KEY, see p. 7.

Classification of Items of Information		Def. Page No.	Programs	
			By Level	Specific P01–P99
03.05 11 00 00	**Publications**	102		
03.05 12 00 00	**Editorial Services**	102		
03.05 13 00 00	**Information Services**	102		
03.05 14 00 00	**Records Management**	102		
03.05 99 00 00	**Other Internal Services**	102		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs: By Level	Programs: Specific P01–P99
03.06 00 00 00	OPERATION OR APPROVAL OF PROGRAMS AND SCHOOLS	102		
03.06 01 00 00	**Management of Operation or Approval of Programs and Schools**	102		
03.06 02 00 00	**State Education Agency Programs**	102		
03.06 02 01 00	*Teacher Education Improvement*	103		
03.06 02 01 01	Institutional	103		
03.06 02 01 02	Student Teaching	103		
03.06 02 01 99	Other Teacher Education Improvement	103		
03.06 02 02 00	*Public School Approval, Accreditation, Licensing, and Chartering*	103		
03.06 02 02 01	Approval	103		
03.06 02 02 02	Accreditation	103		
03.06 02 02 03	Licensing	103		
03.06 02 02 04	Chartering	103		
03.06 02 02 99	Other Public School Approval, Accreditation, Licensing, and Chartering	103		
03.06 02 03 00	*Nonpublic School Approval, Accreditation, Licensing, and Chartering*	103		
03.06 02 03 01	Approval	104		
03.06 02 03 02	Accreditation	104		
03.06 02 03 03	Licensing	104		
03.06 02 03 04	Chartering	104		
03.06 02 03 99	Other Nonpublic School Approval, Accreditation, Licensing, and Chartering	104		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs: By Level	Programs: Specific P01–P99
03.06 02 04 00	*Public School Personnel Certification and Licensing*	104		
03.06 02 04 01	Professional	104		
03.06 02 04 02	Paraprofessional	104		
03.06 02 04 03	Nonprofessional	104		
03.06 02 04 99	Other Public School Personnel Certification and Licensing	104		
03.06 02 05 00	*Nonpublic School Personnel Certification and Licensing*	104		
03.06 02 05 01	Professional	104		
03.06 02 05 02	Paraprofessional	104		
03.06 02 05 03	Nonprofessional	104		
03.06 02 05 99	Other Nonpublic School Personnel Certification and Licensing	104		
03.06 02 06 00	*Nonschool Personnel Certification and Licensing*	105		
03.06 02 06 01	Professional	105		
03.06 02 06 02	Paraprofessional	105		
03.06 02 06 03	Nonprofessional	105		
03.06 02 06 99	Other Nonschool Personnel Certification and Licensing	105		
03.06 02 07 00	*Direct Assistance to Individual Staff Members of Local Education Agencies and Schools*	105		
03.06 02 07 01	Preservice Orientation and Training	105		

For KEY, see p. 7.

Classification of Items of Information		Def. Page No.	Programs: By Level	Programs: Specific P01–P99
03.06 02 07 02	Professional Leave	105		
03.06 02 07 03	Fellowships	105		
03.06 02 07 04	Traineeships	105		
03.06 02 07 05	Internships	105		
03.06 02 07 99	Other Direct Assistance to Individual Staff Members of Local Education Agencies and Schools	105		
03.06 02 08 00	*Pupil Scholarship and Assistance Programs*	105		
03.06 02 08 01	Scholarships	105		
03.06 02 08 02	Honors	105		
03.06 02 08 03	Work Study	106		
03.06 02 08 99	Other Pupil Scholarship and Assistance Programs	106		
03.06 02 09 00	*Pupil Transportation*	106		
03.06 02 10 00	*Educational Media*	106		
03.06 02 10 01	School Library Services	106		
03.06 02 10 02	Television in Education	106		
03.06 02 10 03	Radio in Education	106		
03.06 02 10 99	Other Educational Media	106		
03.06 02 11 00	*Cultural Programs*	106		
03.06 02 11 01	Library	106		
03.06 02 11 02	Art	106		
03.06 02 11 03	Music	107		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs	
			By Level	Specific P01-P99
03.06 02 11 04	Museum	107		
03.06 02 11 05	Dramatic Arts	107		
03.06 02 11 99	Other Cultural Programs	107		
03.06 02 12 00	*Vocational Rehabilitation*	107		
03.06 02 13 00	*Civil Defense*	107		
03.06 02 14 00	*Budget Review and Audit*	107		
03.06 02 99 00	*Other State Education Agency Programs*	107		
03.06 03 00 00	**State Education Agency Operated Schools and Institutions**	107		
03.06 03 01 00	*Elementary (Regular)*	107		
03.06 03 02 00	*Secondary (Regular)*	107		
03.06 03 03 00	*School for the Deaf*	107		
03.06 03 04 00	*School for the Blind*	107		
03.06 03 05 00	*School for the Mentally Retarded*	107		
03.06 03 06 00	*Hospital School*	108		
03.06 03 07 00	*Correctional School*	108		
03.06 03 08 00	*Junior College*	108		
03.06 03 09 00	*College*	108		
03.06 03 10 00	*University*	108		
03.06 03 11 00	*Vocational and Technical*	108		
03.06 03 12 00	*Adult Education*	108		
03.06 03 99 00	*Other State Education Agency Operated Schools and Institutions*	108		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs By Level	Programs Specific P01–P99
03.06 99 00 00	**Other Operation or Approval of Programs and Schools**	108		
03.99 00 00 00	OTHER FUNCTIONS OF STATE DEPARTMENTS OF EDUCATION	108		

For KEY, see p. 7.

04. SERIES

PERSONNEL OF STATE EDUCATION AUTHORITY AND STATE DEPARTMENT OF EDUCATION*

Classification of Items of Information		Def. Page No.	State Educ. Auth.	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.00 00 00 00	**PERSONNEL OF STATE EDUCATION AUTHORITY AND STATE DEPARTMENT OF EDUCATION***	109						
04.01 00 00 00	PERSONAL IDENTIFICATION INFORMATION	109						
04.01 01 00 00	**Legal Name**	109						
04.01 02 00 00	**Other Name**	109						
04.01 03 00 00	**Identification Number**	109						
04.01 04 00 00	**Social Security Number**	109						
04.01 05 00 00	**Race**	109						
04.01 06 00 00	**Sex**	109						
04.01 06 01 00	*Male*	109						
04.01 06 02 00	*Female*	109						
04.01 07 00 00	**Date of Birth**	109						
04.01 08 00 00	**Place of Birth**	109						
04.01 09 00 00	**Evidence Verifying Date and Place of Birth**	109						

KEY

State Educ. Auth.—State Education Authority: members or staff of State Board of Education or other State Board

State Department of Education Staff—Staff members of State Department of Education

Prof. Ed.—Professional staff members, education
Other Prof.—Professional staff members, other than education
Technical—Technological specialists, other than education
Clerical—Communication, record keeping, and operational staff
Other—All other staff members

*The 04 Series may also be used to classify information on personnel of other State education agencies and other State governmental agencies having educational functions.

	Classification of Items of Information	Def. Page No.	State Educ. Auth.	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.01 10 00 00	**Military Service Status**	109						
04.01 11 00 00	**Citizenship Status**	109						
04.01 11 01 00	*Citizen*	109						
04.01 11 01 01	Natural Born United States Citizen	109						
04.01 11 01 02	Naturalized United States Citizen	109						
04.01 11 02 00	*Noncitizen*	109						
04.01 11 02 01	Noncitizen, Citizenship Papers Pending	109						
04.01 11 02 02	Noncitizen, Other	109						
04.01 11 03 00	*Nation of Citizenship if Other Than United States*	110						
04.01 99 00 00	**Other Personal Identification Information**	110						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	Programs By Level	Programs Specific P01-P99
04.02 00 00 00	ASSIGNMENT CLASSIFICATION	110		
04.02 01 00 00	**State Education Authority Assignment**	110		
04.02 02 00 00	**Presiding Officer of State Education Authority Assignment**	110		
04.02 03 00 00	**Administrative Assistant to State Education Authority Assignment**	110		
04.02 04 00 00	**Chief Executive Officer Assignment**	110		
04.02 05 00 00	**Deputy or Assistant Chief Executive Officer Assignment**	111		
04.02 06 00 00	**Administrative Assistant to Chief Executive Officer Assignment**	111		
04.02 07 00 00	**Management Assignment Other Than Chief Executive or Deputy Assignment**	111		
04.02 08 00 00	**Assistant Management Assignment Other Than Deputy or Assistant**	111		
04.02 09 00 00	**Planning Assignment**	111		
04.02 10 00 00	**Research Assignment**	111		
04.02 11 00 00	**Development Assignment**	111		
04.02 12 00 00	**Evaluation Assignment**	111		
04.02 13 00 00	**Management Information System Assignment**	111		
04.02 14 00 00	**Systems Analysis Assignment**	111		
04.02 15 00 00	**Statistical Assignment**	111		
04.02 16 00 00	**Machine Data Processing Assignment**	112		
04.02 17 00 00	**Communication Assignment**	112		
04.02 18 00 00	**Consultant Assignment**	112		

For KEY, see p. 7.

Classification of Items of Information		Def. Page No.	Programs	
			By Level	Specific P01-P99
04.02 19 00 00	**Training Assignment**	112		
04.02 20 00 00	**Personnel Assignment**	112		
04.02 21 00 00	**Accounting Assignment**	112		
04.02 22 00 00	**Auditing Assignment**	112		
04.02 23 00 00	**Bookkeeping Assignment**	112		
04.02 24 00 00	**Purchasing Assignment**	112		
04.02 25 00 00	**Stores Handling Assignment**	112		
04.02 26 00 00	**Mail Control Assignment**	113		
04.02 27 00 00	**Records Management Assignment**	113		
04.02 28 00 00	**Legal Assignment**	113		
04.02 29 00 00	**Legislative Liaison Assignment**	113		
04.02 30 00 00	**Architectural and Engineering Assignment**	113		
04.02 31 00 00	**Media Assignment**	113		
04.02 32 00 00	**Library Assignment**	113		
04.02 33 00 00	**Historian Assignment**	113		
04.02 34 00 00	**Curator and Scientist Assignment**	113		
04.02 35 00 00	**Graphic Arts Assignment**	113		
04.02 36 00 00	**Editorial Assignment**	113		
04.02 37 00 00	**Publications Assignment**	114		
04.02 38 00 00	**Information Services Assignment**	114		
04.02 39 00 00	**Public Relations Assignment**	114		

For KEY, see p. 7.

	Classification of Items of Information	Def. Page No.	Programs: By Level	Programs: Specific P01-P99
04.02 40 00 00	**Accreditation Assignment**	114		
04.02 41 00 00	**Certification Assignment**	114		
04.02 42 00 00	**Licensing Assignment**	114		
04.02 43 00 00	**School Direction and Management Assignment**	114		
04.02 44 00 00	**Assistant School Direction and Management Assignment**	114		
04.02 45 00 00	**Teaching Assignment**	115		
04.02 46 00 00	**Clerical Assignment**	115		
04.02 47 00 00	**Crafts or Trades Assignment**	115		
04.02 48 00 00	**Vehicle Operation Assignment**	115		
04.02 49 00 00	**Custodian Assignment**	115		
04.02 50 00 00	**Labor Assignment**	115		
04.02 5I 00 00	**Other Professional Assignment**	115		
04.02 52 00 00	**Other Technical Assignment**	115		
04.02 99 00 00	**Other Assignment Classification**	115		

For KEY, see p. 7.

Classification of Items of Information		Def. Page No.	Programs: By Level	Programs: Specific P01-P99
04.03 00 00 00	SCOPE OF ASSIGNMENT	115		
04.03 01 00 00	**Out-of-State**	116		
04.03 02 00 00	**Statewide**	116		
04.03 03 00 00	**Regional in-State**	116		
04.03 04 00 00	**Local**	116		
04.03 05 00 00	**Internal**	116		
04.03 99 00 00	**Other Scope of Assignment**	116		

For KEY, see p. 7.

3A
46

	Classification of Items of Information	Def. Page No.	Programs: By Level	Programs: Specific P01–P99
04.04 00 00 00	GROUP ASSIGNMENT CLASSIFICATION	116		
04.04 01 00 00	**State Education Authority Assignment**	116		
04.04 02 00 00	**Professional Educational Assignment**	116		
04.04 03 00 00	**Professional Assignment Other Than Educational**	117		
04.04 04 00 00	**Technical Assignment**	117		
04.04 05 00 00	**Clerical Assignment**	117		
04.04 99 00 00	**Other Group Assignment Classification**	117		

For KEY, see p. 11.

47PA

Classification of Items of Information		Def. Page No.	State Educ. Auth	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.05 00 00 00	FAMILY AND RESIDENCE INFORMATION	117						
04.05 01 00 00	**Family Information**	117						
04.05 01 01 00	*Marital Status*	117						
04.05 01 02 00	*Dependents*	117						
04.05 01 99 00	*Other Family Information*	117						
04.05 02 00 00	**Residence Information**	117						
04.05 02 01 00	*Permanent Address*	117						
04.05 02 02 00	*Second Address*	117						
04.05 02 99 00	*Other Residence Information*	117						
04.05 03 00 00	**Telephone Numbers**	117						
04.05 03 01 00	*At Permanent Address*	117						
04.05 03 02 00	*At Second Address*	117						
04.05 03 03 00	*At Location of Assignment*	117						
04.05 03 99 00	*Other Telephone Numbers*	117						
04.05 04 00 00	**Person to be Notified in Emergency**	117						
04.05 99 00 00	**Other Family and Residence Information**	117						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff: Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.06 00 00 00	HEALTH INFORMATION	117						
04.06 01 00 00	**Physical Health**	118						
04.06 01 01 00	*Physical Examinations*	118						
04.06 01 01 01	Date of Most Recent Physical Examination	118						
04.06 01 01 02	Name and Address of Physician Who Performed the Physical Examination or Health Test	118						
04.06 01 01 03	Physical Examination or Health Test Results	118						
04.06 01 02 00	*Physical Disability or Limitation*	118						
04.06 01 03 00	*Immunization*	118						
04.06 01 04 00	*Personal Injury*	118						
04.06 99 00 00	**Other Health Information**	118						

For KEY, see p. 28.

49

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.07 00 00 00	PRIOR SERVICE OR EMPLOY-MENT INFORMATION	118						
04.07 01 00 00	**Prior School Service or Employment**	118						
04.07 01 01 00	*Dates of Each Prior School Service or Employment*	118						
04.07 01 02 00	*Service or Employer (Name and Location)*	118						
04.07 01 03 00	*Nature of Service or Employment Assign-ment*	118						
04.07 01 04 00	*Total Number of Years of Prior School Ser-vice or Emoloyment*	118						
04.07 02 04 01	Prior Public School Service or Employ-ment	119						
04.07 01 04 02	Prior Nonpublic School Service or Employment	119						
04.07 02 00 00	**Prior Nonschool Service or Employment**	119						
04.07 02 01 00	*Dates of Each Prior Nonschool Service or Employment*	119						
04.07 02 02 00	*Service or Employer (Name and Location)*	119						
04.07 02 03 00	*Nature of Service or Assignment (Job Title)*	119						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff: Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.07 02 04 00	*Total Number of Years of Prior Nonschool Service or Employment*	119						
04.07 99 00 00	**Other Prior Service or Employment Information**	119						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.08 00 00 00	CURRENT SERVICE OR EMPLOY-MENT INFORMATION	119						
04.08 01 00 00	**Date Began**	119						
04.08 02 00 00	**Time Status**	119						
04.08 02 01 00	*Full-Time*	119						
04.08 02 02 00	*Part-Time*	119						
04.08 02 99 00	*Other Time Status*	119						
04.08 03 00 00	**Service or Employment Status**	119						
04.08 03 01 00	*Temporary*	120						
04.08 03 02 00	*Probationary*	120						
04.08 03 03 00	*Permanent or Tenure*	120						
04.08 03 99 00	*Other Service or Employ-ment Status*	120						
04.08 04 00 00	**Contractual Status**	120						
04.08 04 01 00	*Annual Contract*	120						
04.08 04 02 00	*Two-Year Contract*	120						
04.08 04 03 00	*Three-Year Contract*	120						
04.08 04 04 00	*Continuing Contract*	120						
04.08 04 05 00	*None*	120						
04.08 04 99 00	*Other Contractual Status*	120						
04.08 05 00 00	**Contract Dates**	120						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.08 06 00 00	**Period of Time Annually Employed**	120						
04.08 07 00 00	**Assignment Location in Agency**	120						
04.08 08 00 00	**Number of Years Served or Employed**	121						
04.08 09 00 00	**Number of Years in Current Assignment**	121						
04.08 10 00 00	**Current Annual Salary or Wage**	121						
04.08 10 01 00	*Annual Contract Salary or Wage*	121						
04.08 10 02 00	*Wage Rate*	121						
04.08 10 99 00	*Other Current Annual Salary or Wage*	121						
04.08 11 00 00	**Remuneration Other Than Salary or Wage**	121						
04.08 11 01 00	*Per Diem*	121						
04.08 11 01 01	Reimbursement for Expenses	121						
04.08 11 01 02	Reimbursement for Services Rendered	121						
04.08 11 99 00	*Other Remuneration Other Than Salary or Wage*	121						
04.08 12 00 00	**Classification**	121						
04.08 99 00 00	**Other Current Service or Employment Information**	121						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.09 00 00 00	EDUCATIONAL BACKGROUND AND CREDENTIAL INFORMATION	121						
04.09 01 00 00	**Highest Level of Education Completed**	121						
04.09 01 01 00	*Less Than College Level*	121						
04.09 01 01 01	Less Than Secondary Level	121						
04.09 01 01 02	Secondary Level Completed	121						
04.09 01 01 03	One Year Postsecondary	122						
04.09 01 01 04	Two Years Postsecondary	122						
04.09 01 01 05	Registered Apprenticeship Program Completed	122						
04.09 01 01 99	Other Less Than College Level	122						
04.09 01 02 00	*College Work Completed*	122						
04.09 01 02 01	One Year of College	122						
04.09 01 02 02	Two Years of College	122						
04.09 01 02 03	Three Years of College	122						
04.09 01 02 04	Bachelor's Degree	122						
04.09 01 02 05	Bachelor's Degree Plus 15 Semester Hours	122						
04.09 01 02 06	Master's Degree or Equivalent	122						
04.09 01 02 07	Master's Degree or Equivalent Plus 30 Semester Hours	122						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.09 01 02 08	Other Second-Level Degree or Advance Certificate	122						
04.09 01 02 09	Doctor's Degree	122						
04.09 02 00 00	**Information About Schools or Other Educational Institutions Attended**	122						
04.09 02 01 00	*Names of the Schools or Other Educational Institutions Attended*	122						
04.09 02 02 00	*Types of Schools or Other Educational Institutions Attended*	122						
04.09 02 03 00	*Location of Schools or Other Educational Institutions Attended*	122						
04.09 02 04 00	*Dates of Attendance at Schools or Other Educational Institutions*	122						
04.09 02 05 00	*Accreditation Status of Schools or Other Educational Institutions Attended*	123						
04.09 03 00 00	**Information About College Preparation**	123						
04.09 03 01 00	*Major(s)*	123						
04.09 03 02 00	*Number of Semester Hours of Credit Earned in Each Major*	123						
04.09 03 03 00	*Minor(s)*	123						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff: Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.09 03 04 00	*Number of Semester Hours of Credit Earned in Each Minor*	123						
04.09 03 05 00	*Each Field or Area of Specific Preparation*	123						
04.09 03 06 00	*Number of Semester Hours of Credit Earned in Each Field or Area of Specific Preparation*	123						
04.09 03 07 00	*Number of Semester Hours of Professional Credit Earned*	123						
04.09 03 08 00	*Total Number of Semester Hours of Credit Earned*	123						
04.09 04 00 00	**Credential Information**	123						
04.09 04 01 00	*Name of Credential Held*	123						
04.09 04 02 00	*Issuing Agency*	123						
04.09 04 03 00	*Date of Issuance*	123						
04.09 04 04 00	*Date Credential Renewed or Reissued*	124						
04.09 04 05 00	*Credential Expiration Date*	124						
04.09 04 06 00	*Area of Responsibility Authorized by Credential*	124						
04.09 04 07 00	*Instructional Levels Authorized by Credential*	124						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.09 04 08 00	*Grade(s) Authorized by Credential*	124						
04.09 04 09 00	*Teaching Fields or Areas Authorized by Credential or Endorsement*	124						
04.09 04 10 00	*Course(s) or Subject(s) Authorized by Credential*	124						
04.09 04 11 00	*Noncourse Instruction Authorized by Credential*	124						
04.09 04 12 00	*Nonteaching Assignment*	124						
04.09 04 99 00	*Other Credential Information*	124						
04.09 99 00 00	**Other Educational Background and Credential Information**	124						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff: Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.10 00 00 00	OTHER EDUCATION OR TRAINING, ORGANIZATIONAL MEMBERSHIPS, TRAVEL, AND AVOCATIONAL INFORMATION	124						
04.10 01 00 00	**Other Education or Training**	124						
04.10 02 00 00	**Organizational Memberships and Participation**	125						
04.10 02 01 00	*Professional Organizations*	125						
04.10 02 02 00	*Honorary, Cultural, and Civic Organizations*	125						
04.10 03 00 00	**Travel**	125						
04.10 04 00 00	**Avocational Interests and Abilities**	125						
04.10 05 00 00	**Foreign Language**	125						
04.10 99 00 00	**Other: Other Education or Training, Organizational Memberships, Travel, and Avocational Information**	125						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.11 00 00 00	TERMINATION OF SERVICE OR EMPLOYMENT, LEAVE, RETIREMENT, AND INSURANCE INFORMATION	125						
04.11 01 00 00	**Termination Information**	125						
04.11 01 01 00	*Voluntary Termination*	125						
04.11 01 01 01	To Accept Public School Employment in the State	125						
04.11 01 01 02	To Accept Nonpublic School Employment in the State	125						
04.11 01 01 03	To Accept Public School Employment in Another State	125						
04.11 01 01 04	To Accept Nonpublic School Employment in Another State	125						
04.11 01 01 05	To Return to Formal Study	125						
04.11 01 01 06	To Accept Other Than School Employment	125						
04.11 01 01 07	To Enter Armed Forces	125						
04.11 01 01 08	For Family Reasons	125						
04.11 01 01 09	For Health Reasons	125						
04.11 01 01 10	Voluntary Retirement	125						
04.11 01 01 99	Other Voluntary Termination	125						

For KEY, see p. 28.

04. SERIES (con.)

Classification of Items of Information		Def. Page No.	State Educ. Auth	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.11 01 02 00	*Involuntary Termination*	125						
04.11 01 02 01	Administrative Action	126						
04.11 01 02 02	Certificate Revocation	126						
04.11 01 02 03	Certification Expiration	126						
04.11 01 02 04	Abolition of Job	126						
04.11 01 02 05	Compulsory Retirement	126						
04.11 01 02 06	Death	126						
04.11 01 02 99	Other Involuntary Termination	126						
04.11 01 03 00	*Date of Termination*	126						
04.11 02 00 00	**Leave Information**	126						
04.11 02 01 00	*Sick Leave*	126						
04.11 02 02 00	*Personal Leave*	126						
04.11 02 03 00	*Annual Leave*	126						
04.11 02 04 00	*Sabbatical Leave*	126						
04.11 02 05 00	*Military Leave*	126						
04.11 01 06 00	*Maternity Leave*	126						
04.11 02 99 00	*Other Leave Information*	126						
04.11 03 00 00	**Retirement System Information**	126						

For KEY, see p. 28.

	Classification of Items of Information	Def. Page No.	State Educ. Auth	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.11 04 00 00	**Insurance Information**	126						
04.11 99 00 00	**Other Termination of Service or Employment, Leave, Retirement, and Insurance Information**	126						

For KEY, see p. 28.

Classification of Items of Information		Def. Page No.	State Educ. Auth	State Department of Education Staff				
				Prof. Ed.	Other Prof.	Tech-nical	Cler-ical	Other
04.12 00 00 00	PERFORMANCE INFORMATION	126						

For KEY, see p. 28.

05. SERIES

PROPERTY UTILIZED BY STATE EDUCATION AUTHORITY AND STATE DEPARTMENT OF EDUCATION*

	Classification of Items of Information	Def. Page No.	Accounts for Each Unit of Accountability: Facility	Accounts for Each Unit of Accountability: Equipment Unassigned	Type of Entry
05.00 00 00 00	**PROPERTY UTILIZED BY STATE EDUCATION AUTHORITY AND STATE DEPARTMENT OF EDUCATION***	126			
05.01 00 00 00	SITE IDENTIFICATION	127			
05.01 01 00 00	**Location of Site**	127			
05.01 02 00 00	**Use of Site**	127			
05.01 02 01 00	*State Department of Education Office Building*	127			
05.01 02 02 00	*Instruction Building*	127			
05.01 02 03 00	*Transportation Building*	127			
05.01 02 04 00	*Maintenance Building*	127			
05.01 02 05 00	*Warehouse*	127			
05.01 02 06 00	*Food Services Building*	127			
05.01 02 07 00	*Public Library Building*	127			
05.01 02 08 00	*Museum Building*	127			
05.01 02 09 00	*State School Building*	127			
05.01 02 10 00	*Community Services Building*	127			

KEY

Accounts for Each Unit of Accountability:

Facility—A piece of land, a building site, a building, or part of a building.
Equipment Unassigned—Equipment used by more than one facility; equipment in storage.

Type of Entry: DE—Descriptive Entry.
NE—Numerical Entry.

*The 05 Series may also be used to classify information on property utilized by other State education agencies and other State governmental agencies having educational functions.

63

05. SERIES (con.)

	Classification of Items of Information	Def. Page No.	Accounts for Each Unit of Accountability: Facility	Accounts for Each Unit of Accountability: Equipment Unassigned	Type of Entry
05.01 02 11 00	*Parking*	128			
05.01 02 11 01	Employee	128			
05.01 02 11 02	Public	128			
05.01 02 11 99	Other Parking	128			
05.01 02 99 00	*Other Use of Site*	128			
05.01 03 00 00	**Ownership of Site**	128			
05.01 03 01 00	*Public*	128			
05.01 03 01 01	State	128			
05.01 03 01 02	Municipal	128			
05.01 03 01 03	Authority	128			
05.01 03 01 99	Other Public	128			
05.01 03 02 00	*Nonpublic*	128			
05.01 03 02 01	Rented	128			
05.01 03 02 02	Leased	128			
05.01 03 02 99	Other Nonpublic	128			
05.01 04 00 00	**Dates of Acquisition**	128			
05.01 04 01 00	*Original Site*	128			
05.01 04 02 00	*Each Addition to Original Site*	128			
05.01 05 00 00	**Date of Disposal**	128			

For KEY, see p. 50.

64

	Classification of Items of Information	Def. Page No.	Accounts for Each Unit of Accountability: Facility	Accounts for Each Unit of Accountability: Equipment Unassigned	Type of Entry
05.01 06 00 00	**Area of Site**	129			
05.01 07 00 00	**Cost of Site**	129			
05.01 07 01 00	*Cost of Land*	129			
05.01 07 02 00	*Cost of Improvements*	129			
05.01 07 99 00	*Other Cost of Site*	129			
05.01 99 00 00	**Other Site Identification**	129			

For KEY, see p. 50.

65

	Classification of Items of Information	Def. Page No.	Accounts for Each Unit of Accountability: Facility	Accounts for Each Unit of Accountability: Equipment Unassigned	Type of Entry
05.02 00 00 00	BUILDING IDENTIFICATION	129			
05.02 01 00 00	**Location of Building**	129			
05.02 02 00 00	**Use of Building**	129			
05.02 02 01 00	*State Education Authority*	129			
05.02 02 02 00	*State Department of Education*	129			
05.02 02 03 00	*Instructional Services*	129			
05.02 02 04 00	*Transportation Services*	129			
05.02 02 05 00	*Maintenance Services*	130			
05.02 02 06 00	*Warehouse Services*	130			
05.02 02 07 00	*Food Services*	130			
05.02 02 08 00	*Public Library Services*	130			
05.02 02 09 00	*Museum Services*	130			
05.02 02 10 00	*Community Services*	130			
05.02 02 11 00	*State School*	130			
05.02 02 99 00	*Other Use of Building*	130			
05.02 03 00 00	**Ownership of Building**	130			
05.02 03 01 00	*Public*	130			
05.02 03 01 01	State	130			
05.02 03 01 02	Municipal	130			
05.02 03 02 03	Authority	130			

For KEY, see p. 50.

66

05. SERIES (con.)

	Classification of Items of Information	Def. Page No.	Accounts for Each Unit of Accountability: Facility	Accounts for Each Unit of Accountability: Equipment Unassigned	Type of Entry
05.02 03 01 99	Other Public	130			
05.02 03 02 00	*Nonpublic*	130			
05.02 03 02 01	Rented	130			
05.02 03 02 02	Leased	130			
05.02 03 02 99	Other Nonpublic	130			
05.02 04 00 00	**Dates of Acquisition**	130			
05.02 04 01 00	*Original Building*	131			
05.02 04 02 00	*Each Addition to Original Building*	131			
05.02 05 00 00	**Design Life of Building**	131			
05.02 06 00 00	**Anticipated Useful Life of Building**	131			
05.02 07 00 00	**Date of Disposal**	131			
05.02 08 00 00	**Type of Building Construction**	131			
05.02 08 01 00	*Fire-Resistive*	131			
05.02 08 02 00	*Semi-Fire-Resistive*	131			
05.02 08 03 00	*Combustible*	131			
05.02 08 04 00	*Mixed Construction*	131			
05.02 09 00 00	**Availability of Building**	131			
05.02 09 01 00	*Complete Occupancy*	131			

For KEY, see p. 50.

	Classification of Items of Information	Def. Page No.	Accounts for Each Unit of Accountability: Facility	Accounts for Each Unit of Accountability: Equipment Unassigned	Type of Entry
05.02 09 02 00	*Partial Occupancy*	131			
05.02 09 03 00	*Abandoned*	131			
05.02 10 00 00	**Mobility of Building**	131			
05.02 10 01 00	*Permanent*	131			
05.02 10 02 00	*Mobile*	132			
05.02 11 00 00	**Size of Building**	132			
05.02 11 01 00	*Gross Floor Area*	132			
05.02 11 01 01	Area of Basement	132			
05.02 11 01 02	Area of First Floor	132			
05.02 11 01 03	Area of Each Additional Floor	132			
05.02 12 00 00	**Cost of Building**	132			
05.02 13 00 00	**State Education Authority and State Department of Education Areas in Building**	132			
05.02 13 01 00	*State Board of Education*	133			
05.02 13 02 00	*Other State Education Authority*	133			
05.02 13 03 00	*General Management*	133			
05.02 13 04 00	*Planning, Research, Development, and Evaluation*	133			
05.02 13 05 00	*Consultative Services*	133			

For KEY, see p. 50.

Classification of Items of Information		Def. Page No.	Accounts for Each Unit of Accountability		Type of Entry
			Facility	Equipment Unassigned	
05.02 13 06 00	*Distribution of Resources*	133			
05.02 13 07 00	*Internal Services*	133			
05.02 13 08 00	*Operation or Approval of Programs and Schools*	133			
05.02 13 99 00	*Other State Education Authority and State Department of Education Areas in Building*	133			
05.02 14 00 00	**Office Areas of Building**	133			
05.02 15 00 00	**Circulation Areas of Building**	133			
05.02 16 00 00	**Functional Areas in Building**	133			
05.02 16 01 00	*Staff Library*	133			
05.02 16 02 00	*Storage*	133			
05.02 16 03 00	*Cafeterias or Lunchrooms*	133			
05.02 16 04 00	*Conference or Staff Rooms*	133			
05.02 16 05 00	*Toilet Rooms*	133			
05.02 16 99 00	*Other Functional Areas in Building*	133			
05.02 17 00 00	**Building Service Systems**	134			
05.02 17 01 00	*Heating*	134			
05.02 17 02 00	*Cooling*	134			
05.02 17 03 00	*Ventilating*	134			

For KEY, see p. 50.

	Classification of Items of Information	Def. Page No.	Accounts for Each Unit of Accountability: Facility	Accounts for Each Unit of Accountability: Equipment Unassigned	Type of Entry
05.02 17 04 00	*Water Supply and Sewage Disposal*	134			
05.02 17 05 00	*Electrical*	134			
05.02 17 99 00	*Other Building Service Systems*	134			
05.02 18 00 00	**Communication Systems**	134			
05.02 18 01 00	*Telephone*	134			
05.02 18 02 00	*Intercommunication*	134			
05.02 18 03 00	*Remote*	134			
05.02 18 03 01	Telephone	134			
05.02 18 03 02	Teletype	134			
05.02 18 03 03	Computer Terminal	134			
05.02 18 03 04	Radio	134			
05.02 18 03 99	Other Remote System	134			
05.02 19 00 00	**Television System**	135			
05.02 19 01 00	*Program Origination*	135			
05.02 19 01 01	Open Circuit	135			
05.02 19 01 02	Closed Circuit	135			
05.02 19 01 99	Other Program Origination	135			
05.02 19 02 00	*Program Reception*	135			
05.02 19 02 01	Open Circuit	135			

For KEY, see p. 50.

70?

	Classification of Items of Information	Def. Page No.	Accounts for Each Unit of Accountability: Facility	Accounts for Each Unit of Accountability: Equipment Unassigned	Type of Entry
05.02 19 02 02	Closed Circuit	135			
05.02 19 02 99	Other Program Reception	135			
05.02 20 00 00	**Fire Protection System**	135			
05.02 21 00 00	**Elevators and Escalators**	135			
05.02 22 00 00	**Adequacy of Building**	135			
05.02 99 00 00	**Other Building Identification**	135			

For KEY, see p. 50.

71

Classification of Items of Information		Def. Page No.	Accounts for Each Unit of Accountability: Facility	Accounts for Each Unit of Accountability: Equipment Unassigned	Type of Entry
05.03 00 00 00	EQUIPMENT IDENTIFICATION	135			
05.03 01 00 00	**Kinds of Equipment**	135			
05.03 01 01 00	*Furniture*	135			
05.03 01 02 00	*Machinery and Apparatus*	136			
05.03 01 03 00	*Hand Tools*	136			
05.03 01 04 00	*Bench, Desk, or Floor machinery and Apparatus*	136			
05.03 01 05 00	*Heavy Construction Machinery*	136			
05 03 01 06 00	*Vehicles*	136			
05.03 01 07 00	*Electronic and Electromechanical*	136			
05.03 01 07 01	Television	136			
05.03 01 07 02	Radio	136			
05.03 01 07 03	Computer	136			
05.03 01 07 99	Other Electronic and Electromechanical	137			
05.03 02 00 00	**Accounts for Each Piece of Equipment**	137			
05.03 02 01 00	*Name*	137			
05.03 02 02 00	*Manufacturer and Model Number*	137			
05.03 02 03 00	*Cost (For Records of Owning Unit Only)*	137			
05.03 02 04 00	*Date of Acquisition*	137			

For KEY, see p. 50.

	Classification of Items of Information	Def. Page No.	Accounts for Each Unit of Accountability: Facility	Accounts for Each Unit of Accountability: Equipment Unassigned	Type of Entry
05.03 02 05 00	*Design Life*	137			
05.03 02 06 00	*Anticipated Useful Life*	137			
05.03 02 07 00	*Date of Disposal*	137			
05.03 02 08 00	*Description of Equipment*	137			
05.03 02 99 00	*Other Accounts for Each Piece of Equipment*	137			
05.03 03 00 00	**Ownership of Equipment**	137			
05.03 03 01 00	*Public*	137			
05.03 03 01 01	State	137			
05.03 03 01 02	Authority	138			
05.03 03 01 03	Federal	138			
05.03 03 01 99	Other Public	138			
05.03 03 02 00	*Nonpublic*	138			
05.03 03 02 01	Rented	138			
05.03 03 02 02	Leased	138			
05.03 03 02 03	Contract-Purchase Agreement	138			
05.03 03 02 99	Other Nonpublic	138			
05.03 03 99 00	*Other Ownership of Equipment*	138			
05.03 04 00 00	**Purpose for Which Equipment is Used**	138			

For KEY, see p. 50.

	Classification of Items of Information	Def. Page No.	Accounts for Each Unit of Accountability: Facility	Accounts for Each Unit of Accountability: Equipment Unassigned	Type of Entry
05.03 04 01 00	*Program Support*	138			
05.03 04 02 00	*Nonprogram Support*	138			
05.03 04 99 00	*Other Purpose for Which Equipment is Used*	138			
05.03 05 00 00	**Assignment of Equipment**	138			
05.03 06 00 00	**Adequacy of Equipment**	138			
05.03 99 00 00	**Other Equipment Identification**	138			

For KEY, see p. 50.

Chapter 3

FINANCIAL ASPECTS

State education agencies, like other public agencies, should maintain a system of financial accounting which provides control over financial resources as well as information for operation and management. The accounting system should be concerned not only with accounting as such but with planning, programing, budgeting, evaluation, and reporting as well. It should reflect the current financial condition of the State education agency with regard to programs, functions, and activities regardless of the time span which they cover. In other words, the accounting system should provide for the recording of the day-by-day transactions and it should show the financial condition of the agency at any given time.

In such a system, precise classification of financial data is required. All items of such data should be classified in such a way as to permit convenient summarizations so that management may use them in exercising various controls and in making decisions which are essential to the efficient and effective management of the agency.

In this handbook, it is not proposed to develop a detailed financial accounting system for State education agencies. The intent, rather, is to identify some general principles and to suggest some classification guidelines which may be applicable to any State education agency and still allow for the development of a system to meet the particular needs of any such agency.

Balance Sheet Accounts

In the past, most State and local school systems maintained accounts by recording only receipts and expenditures. It was not common practice to show the agency's financial condition in total and in relation to the various funds established. Balance sheet accounts, generally associated with profit-making enterprises, were not commonly utilized.

The concept of fund accounting has been accepted, however, and with more and more State education agencies becoming involved in the design and implementation of management information systems, the importance of sound financial accounting systems has become evident. It is now a generally accepted principle that a separate general ledger, consisting of assets, liabilities, fund balance, revenues, and expenditures, should be maintained for each fund. The first three of these comprise the balance sheet accounts for the general ledger and are discussed below. The subsidiary accounts for recording revenue and expenditure detail are discussed later in this chapter.

A. ASSETS

The major asset accounts of the general ledger are: (1) Cash on hand, petty cash, and cash in banks, (2) Investments, (3) Receivables (from other governmental units and other sources), (4) Inventories, such as unissued postage and supplies, (5) Deferred Charges, such as prepaid insurance and prepaid expense, (6) Fixed Assets, including land, buildings, and equipment, and (7) Budgetary Debits covering estimated revenue and actual expenditure control.

B. LIABILITIES

The major liability accounts of the general ledger are: (1) Accounts Payable, (2) Payroll Deductions Payable, (3) Loans Payable, both long and short term, (4) Accrued Expenses, and (5) Budgetary Credits covering appropriations (estimated expenditures) and actual revenue.

C. FUND BALANCE

The fund balance is the difference between the sum of the assets and the sum of the liabilities. Where applicable, fund balance accounts may be maintained to identify unappropriated surplus and specific reserves. Individual State law, however, determines the extent of detail recorded in fund balance accounts. Unlike many local school districts, few State education agencies are allowed to carry forward unappropriated balances from one fiscal year to another. Moreover, in many States the establishment of reserves against unappropriated surplus is illegal. In some States the fund balance reverts to the State treasury.

Classification of Revenues

Revenue account titles applicable to State education agencies are shown below. Each account may be subdivided into further levels of detail as needed.

A. REVENUE FROM STATE SOURCES

The major accounts for recording revenue from State sources are: (1) Appropriations, (2) Special Categorical or Earmarked Grants, and (3) Payments from other State agencies.

B. REVENUE FROM FEDERAL SOURCES

The major accounts for recording revenue from Federal sources are: (1) General Support Grants and (2) Categorical Support Grants.

C. REVENUE FROM OTHER SOURCES

The major accounts for recording revenue from other sources are: (1) Interest from Investments, (2) Rentals, (3) Sale of Fixed Assets, (4) Gifts and Bequests, (5) Loans, (6) Fees, and (7) Sale of Bonds.

The Multidimensional Approach to Recording Expenditures

The varied and complex work of a State education agency is reflected in the nature of the expenditures essential to its operation. The management information system of the agency should provide for a multidimensional approach to the identification, description, quantification, and analysis of the agency's total work. What was purchased, what function was served, what program was supported, what fund was charged, what organizational unit was responsible for the expenditure—these questions indicate the "dimensions" which should be accounted for if the accounting system is to relate the financial transactions to the work of the agency.

As used in this handbook, the term DIMENSION denotes a key segment of information which serves to relate the work of the agency to expenditures. A CATEGORY is a unit or line-item within a dimension. Thus, one dimension is Object (what was purchased), whereas one category under this dimension is Equipment.

Minimum recommended dimensions in this handbook are: Function (carried to the fourth level of detail), Object, Program Level, Specific Program, Location, Fund, and Source of Revenue. Definitions of dimensions and categories and an illustrative coding structure for expenditures are shown later in this chapter.

A. FUNCTION

In this handbook six major functions are identified as follows: (1) General Management, (2) Planning, Research, Development, and Evaluation, (3) Consultative Services, (4) Distribution of Resources, (5) Internal Services, and (6) Operation or Approval of Programs and Schools.

B. **Second Level of Detail** (FUNCTION) (See page 4 for explanation of level of detail.)

C. *Third Level of Detail* (FUNCTION)

D. Fourth Level of Detail (FUNCTION)

E. OBJECT

An object of expenditure refers to the commodity or service obtained from a specific expenditure. In this handbook, nine major categories under this dimension are identified and defined: (1) Salaries and Benefits—Professional, (2) Salaries and Benefits—Nonprofessional, (3) Purchased Services, (4) Supplies and Materials, (5) Equipment, (6) Land and Buildings, (7) Other Expenses, (8) Grants and Subsidies, and (9) Transfers.

Under each of these categories many subobjects may be identified if desired. Following are suggested code numbers and definitions for the nine categories:

10 Salaries and Benefits—Professional

Full-time, part-time, and prorated portions of the gross salary costs for work performed by professional employees who are considered to be in positions of a permaent nature or whc are hired on a temporary or substitute basis to perform work in positions of either temporary or permanent nature. This category also includes employee benefits, i.e., amounts paid by the employer in behalf of employees; these amounts are not included in gross salary, but are over and above it. They are fringe benefit payments, and, while not paid directly to employees, they are a part of the cost of staff-provided personal services. Examples of employee benefits are: (a) Group Health or Life

Insurance, (b) Contributions to Employee Retirement, (c) Social Security Contributions, and (d) Workmen's Compensation.

20 Salaries and Benefits—Nonprofessional

Same as the (10) category above except that this category applies only to nonprofessional personnel.

30 Purchased Services

Personal services rendered by personnel who are not on the payroll of the State agency, and other services which may be purchased or contracted by the State agency. While a product may or may not result from the transaction, the primary reason for the purchase is the service provided in order to obtain the desired results. This category includes nonpayroll services provided by architects, auditors, dentists, doctors, consultants, and lawyers; communication expenses such as telephone, telegraph services, and postage; travel and per diem; transportation; advertising; printing and binding; insurance and bond premiums; fidelity bond premiums; public utility services; repairs and maintenance service (when not provided directly by payroll personnel); rentals; and tuition.

40 Supplies and Materials

Material items of an expendable nature that are consumed. worn out, or deteriorated in use; or items that lose their identity through fabrication or incorporation into different or more complex units or substances. For a detailed list of supply and equipment items, refer to Handbook III, *Property Accounting for Local and State School Systems;* 1959, U.S. Department of Health, Education, and Welfare, Office of Education.

50 Equipment

Any instrument, machine, apparatus, or set of articles which (a) retains its original shape and appearance with use and (b) is nonexpendable; i.e., if the article is damaged or some of its parts are lost or worn out, it is usually more feasible to repair it than to replace it with an entirely new unit. (Information on Equipment is classified in chapter 2 and defined in chapter 4.)

60 Land and Buildings

The acquisition of land and buildings. (Information on Land and Buildings is classified in chapter 2 and defined in chapter 4.)

70 Other Expenses

Any expenses which cannot be classified under those listed and defined above; include debt service (payments of principal and interest).

80 Grants and Subsidies

This is not a true object in the sense of denoting goods or services purchased. It is included here to allow for identifying those resources distributed to other agencies via the State education agency. This procedure prevents the distortion of the operating costs of the agency.

90 Transfers

This is not a true object in the sense of denoting goods or services purchased. It is included here to identify money taken from one fund of the agency and added to another fund of the agency. Such interfund transfers are neither receipts nor expenditures of the agency.

F. PROGRAM LEVEL

The instructional level served by the expenditure. In this handbook, program levels are identified as follows: Elementary, Secondary, Postsecondary, Adult Education, and Undistributed.

G. SPECIFIC PROGRAM

This dimension provides for any further delineation of program, other than program level, as may be designated by the State education agency.

77

H. LOCATION

The organizational unit within the State education agency to which the expenditure is to be charged.

I. FUND

An independent accounting entity with its own assets, liabilities, and fund balances. Generally, funds are established to account for financing of specific activities of an agency's operation.

J. SOURCE OF REVENUE

Source of the money used for the expenditure. Three major sources are State, Federal, and Other.

ILLUSTRATIVE CODING STRUCTURE FOR EXPENDITURES

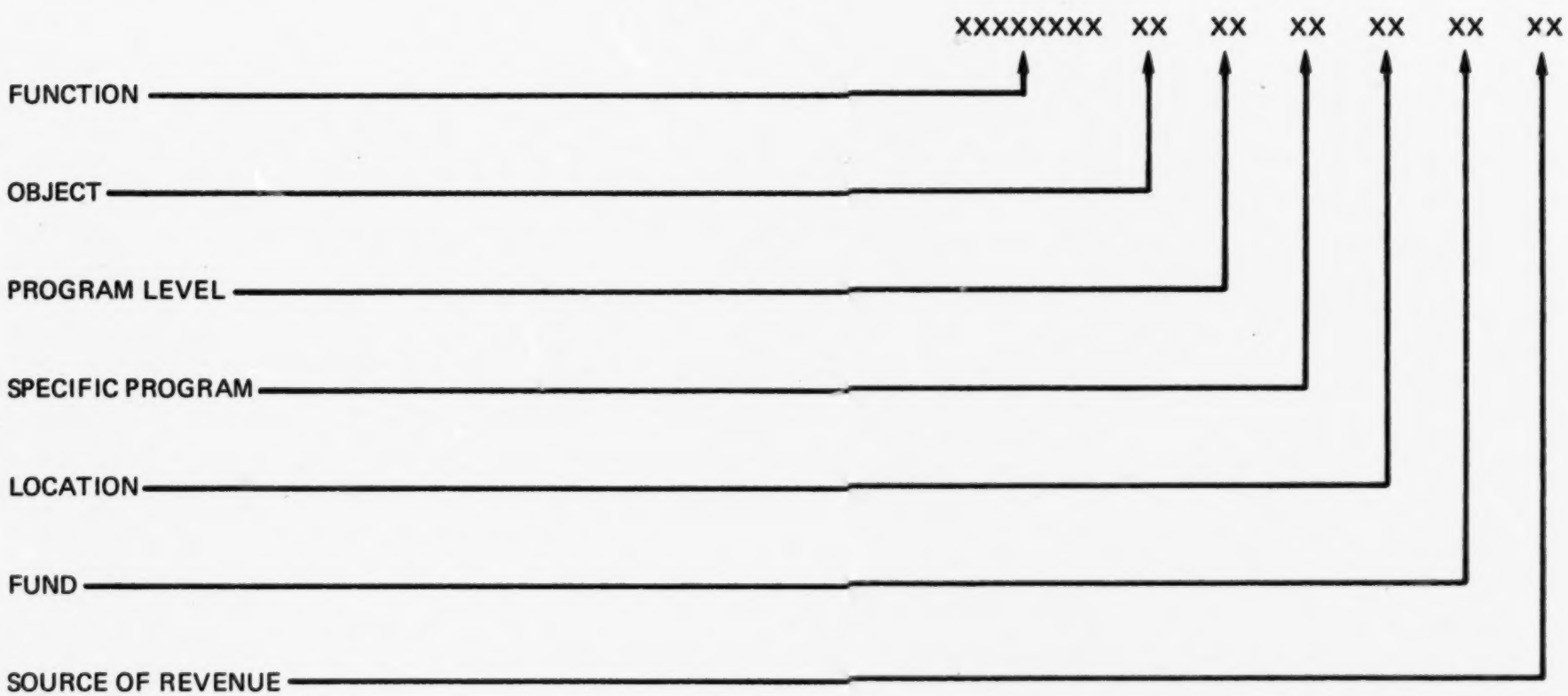

Figure 1

(See definitions on pp. 63-65)

Illustrative Coding Structure for Expenditures

Figure 1 illustrates a 20-digit coding structure for expenditures.

- FUNCTION—8 digits allow for subdividing this dimension to the fourth level of detail. (See page 4 for explanation of levels of detail.)
- OBJECT—2 digits allow for identifying the category within the OBJECT dimension. (See pages 63-64 for listing and definitions.)
- PROGRAM LEVEL—2 digits allow for identifying the program level to which the expenditure applies. (See Key for program level on page 7.)
- SPECIFIC PROGRAM—2 digits allow for identification of any specific programs (as determined by the State education agency). This would accommodate up to 99 specific programs.
- LOCATION—2 digits allow for identifying the organizational unit to which the expenditure is to be charged.
- FUND—2 digits allow for identifying the fund to which the expenditure is to be charged.
- SOURCE OF REVENUE—2 digits allow for identification of the source of money used for the expenditure.

It should be noted that this structure is flexible and open-ended. For instance, if a State department of education maintains four regional offices within the State, one digit could be added to identify the regional office to which the expenditure is to be charged. (Only major dimensions are identified above. Of course, other items of information such as name of payee, date, and fiscal year should be recorded in order to provide a complete record of the transaction.)

Illustrations of Coding for Selected Expenditures

Figures 2 through 8 show illustrative coding procedures for selected expenditures. It should be noted that the first 8 digits correspond to the code number assigned *to the right of the decimal point* in the 03.00 00 00 00 SERIES of this handbook, FUNCTIONS OF STATE DEPARTMENTS OF EDUCATION, beginning on page 10. The first 8 digits allow for this dimension to be subdivided to the fourth level of detail. The ninth and 10th digits indicate the object category (see pages 63-64). The 11th and 12th digits indicate thr program level (see Key, page 7). The last 8 digits (specific Program, Location, Fund, and Source of Revenue) are coded as applicable to each particular situation (see pages 64-65).

(Note: If the financial accounting for both the State Department of Education and the State Education Authority is handled under one system, an additional dimension should be added ahead of "Function" in order to identify the agency to which the expenditure is to be charged. For instance, that dimension would be coded "02" for the State Education Authority and "03" for the State Department of Education.)

Purchase of Typewriter for Office of Chief State School Officer

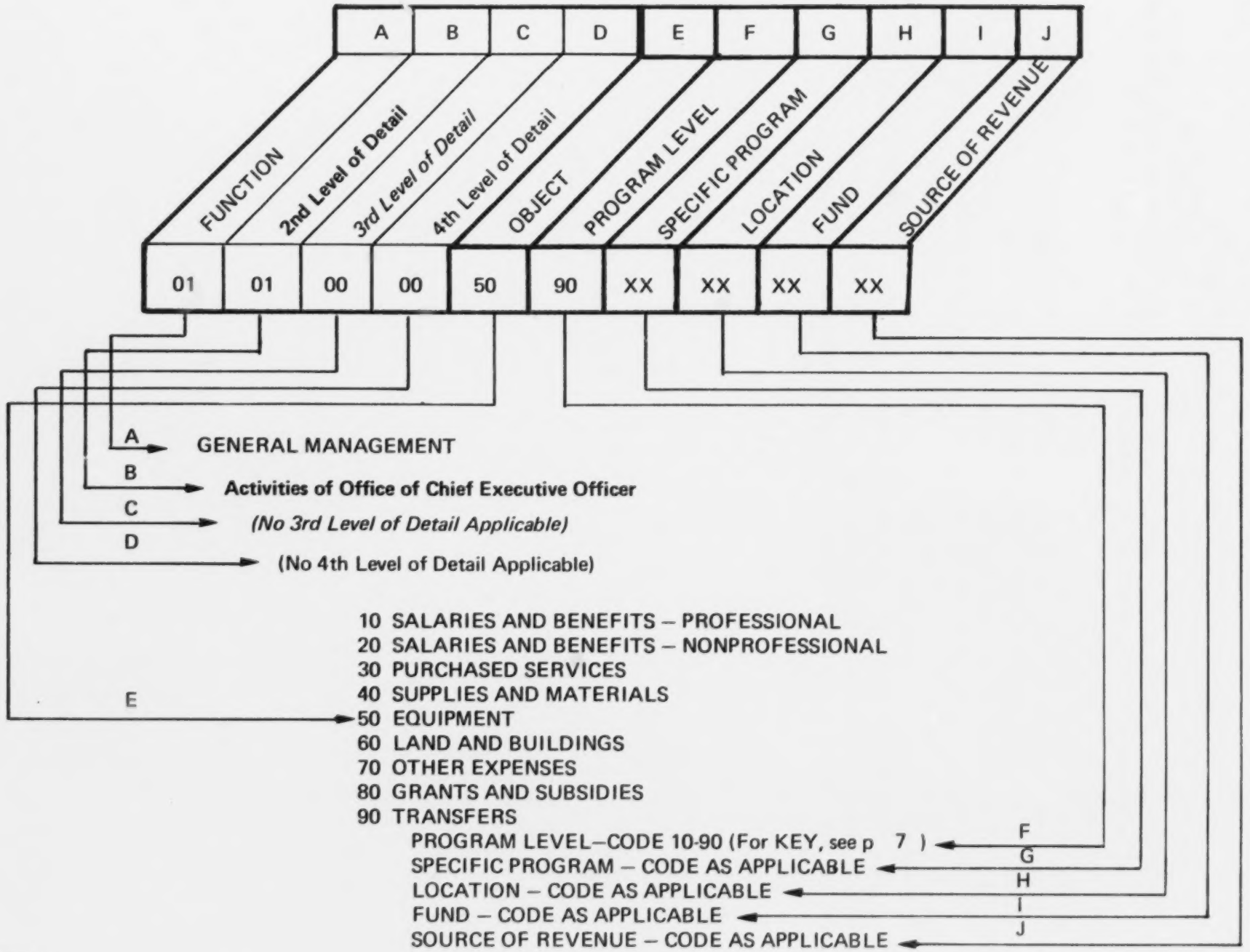
A B C D E F G H I J
FUNCTION
2nd Level of Detail
3rd Level of Detail
4th Level of Detail
OBJECT
PROGRAM LEVEL
SPECIFIC PROGRAM
LOCATION
FUND
SOURCE OF REVENUE
01 01 00 00 50 90 XX XX XX XX
A GENERAL MANAGEMENT
B Activities of Office of Chief Executive Officer
C (No 3rd Level of Detail Applicable)
D (No 4th Level of Detail Applicable)
E
10 SALARIES AND BENEFITS – PROFESSIONAL
20 SALARIES AND BENEFITS – NONPROFESSIONAL
30 PURCHASED SERVICES
40 SUPPLIES AND MATERIALS
50 EQUIPMENT
60 LAND AND BUILDINGS
70 OTHER EXPENSES
80 GRANTS AND SUBSIDIES
90 TRANSFERS
PROGRAM LEVEL–CODE 10-90 (For KEY, see p 7) F
SPECIFIC PROGRAM – CODE AS APPLICABLE G
LOCATION – CODE AS APPLICABLE H
FUND – CODE AS APPLICABLE I
SOURCE OF REVENUE – CODE AS APPLICABLE J

Figure 2

Figure 2

Purchase of Typewriter for Office of Chief State School Officer

A. This expenditure is charged to the **MAJOR FUNCTION** (A) of GENERAL MANAGEMENT and is coded 01 (see 03.00 00 00 00 SERIES beginning on page 10).

B. The **2nd Level of Detail** (B) is **Activities of Office of Chief Executive Officer** and is coded 01.

C-D. The *3rd Level of Detail* (C) and the 4th Level of Detail (D) are not applicable in this case and hence each is coded with zeros.

E. The Object (E) is Equipment and is coded 50.

F. The Program Level (F) is undistributed (since this particular expenditure cannot be charged to any specific instructional level) and is coded 90.

G-J. The Specific Program (G), Location (H), Fund (I), and Source of Revenue (J) are coded as applicable.

The code number for this particular expenditure would be 01 01 00 00 50 90 XX XX XX XX.

Salary for Nonprofessional Staff Member–
Planning, Research, Development, and Evaluation–Statistical Services

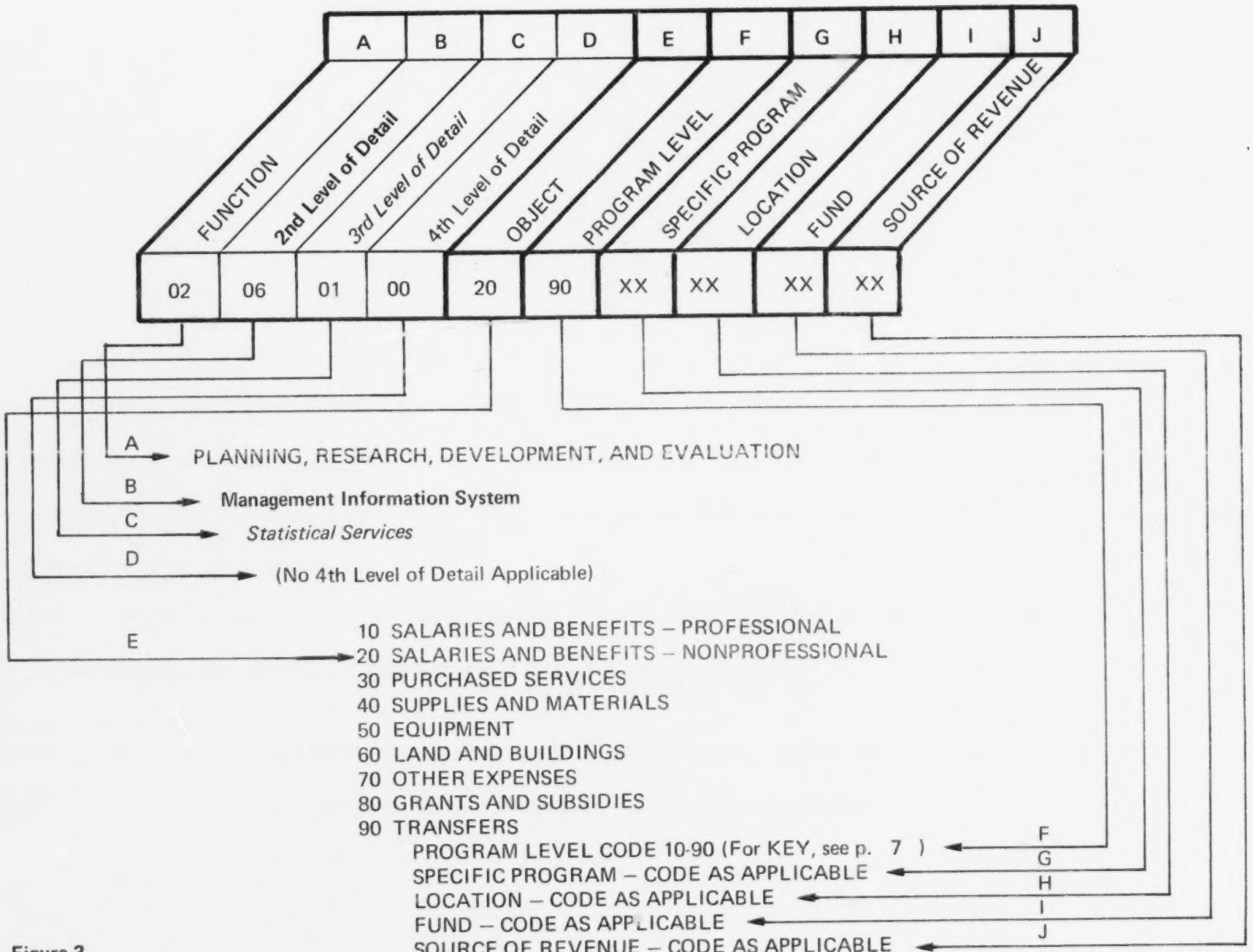

Figure 3

Figure 3

Salary for Nonprofessional Staff Member—
Planning, Research, Development, and Evaluation—Statistical Services

A. This expenditure is charged to the **MAJOR FUNCTION** (A) of PLANNING, RESEARCH, DEVELOPMENT, AND EVALUATION and is coded 02 (see 03.00 00 00 00 SERIES beginning on page 10).

B. The **2nd Level of Detail** (B) is **Management Information System** and is coded 06.

C. The *3rd Level of Detail* (C) is *Statistical Services* and is coded 01.

D. The 4th Level of Detail (D) is not applicable in this case and hence is coded with zeros.

E. The Object (E) is Salaries and Benefits—Nonprofessional and is coded 20.

F. The Program Level (F) is undistributed (since this particular expenditure cannot be charged to any specific instructional level) and is coded 90.

G-J. The Specific Program (G), Location (H), Fund (I), and Source of Revenue (J) are coded as applicable.

The code number for this particular expenditure would be 02 06 0l 00 20 90 XX XX XX XX.

Salary for Professional Consultant—Agriculture—Secondary

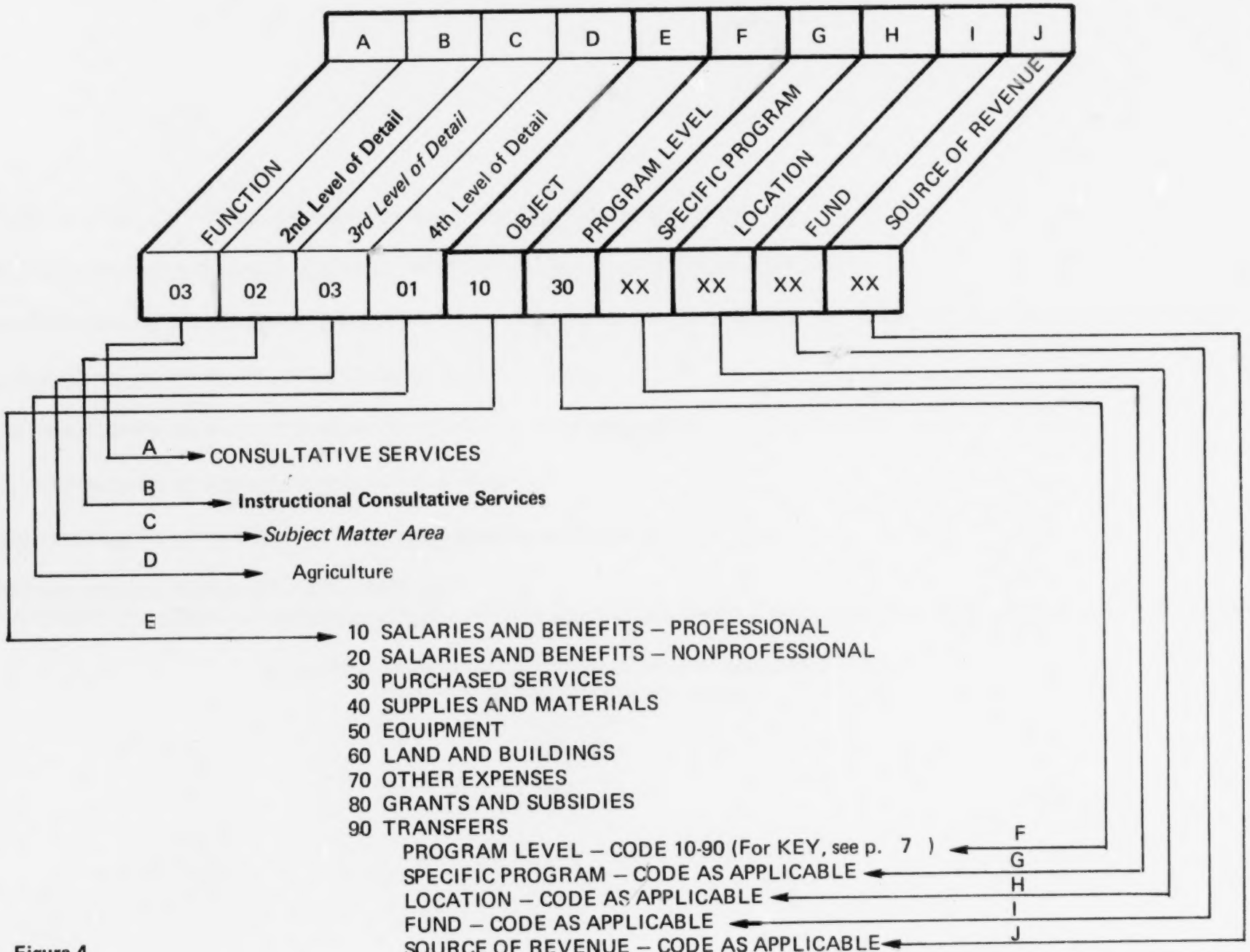

Figure 4

Figure 4

Salary for Professional Consultant–Agriculture–Secondary

A. This expenditure is charged to the **MAJOR FUNCTION** (A) of CONSULTATIVE SERVICES and is coded 03 (see 03.00 00 00 00 SERIES beginning on page 10).

B. The **2nd Level of Detail** (B) is **Instructional Consultative Services** and is coded 02.

C. The *3rd Level of Detail* (C) is *Subject Matter Area* and is coded 03.

D. The 4th Level of Detail (D) is Agriculture and is coded 01.

E. The Object (E) is Salaries and Benefits–Professional and is coded 10.

F. The Program Level (F) is secondary and is coded 30.

G-J. The Specific Program (G), Location (H), Fund (I), and Source of Revenue (J) are coded as applicable.

The code number for this particular expenditure would be 03 02 03 01 10 30 XX XX XX XX.

Payment for Contracted Legal Services Relating to Distribution of State Financial Grants

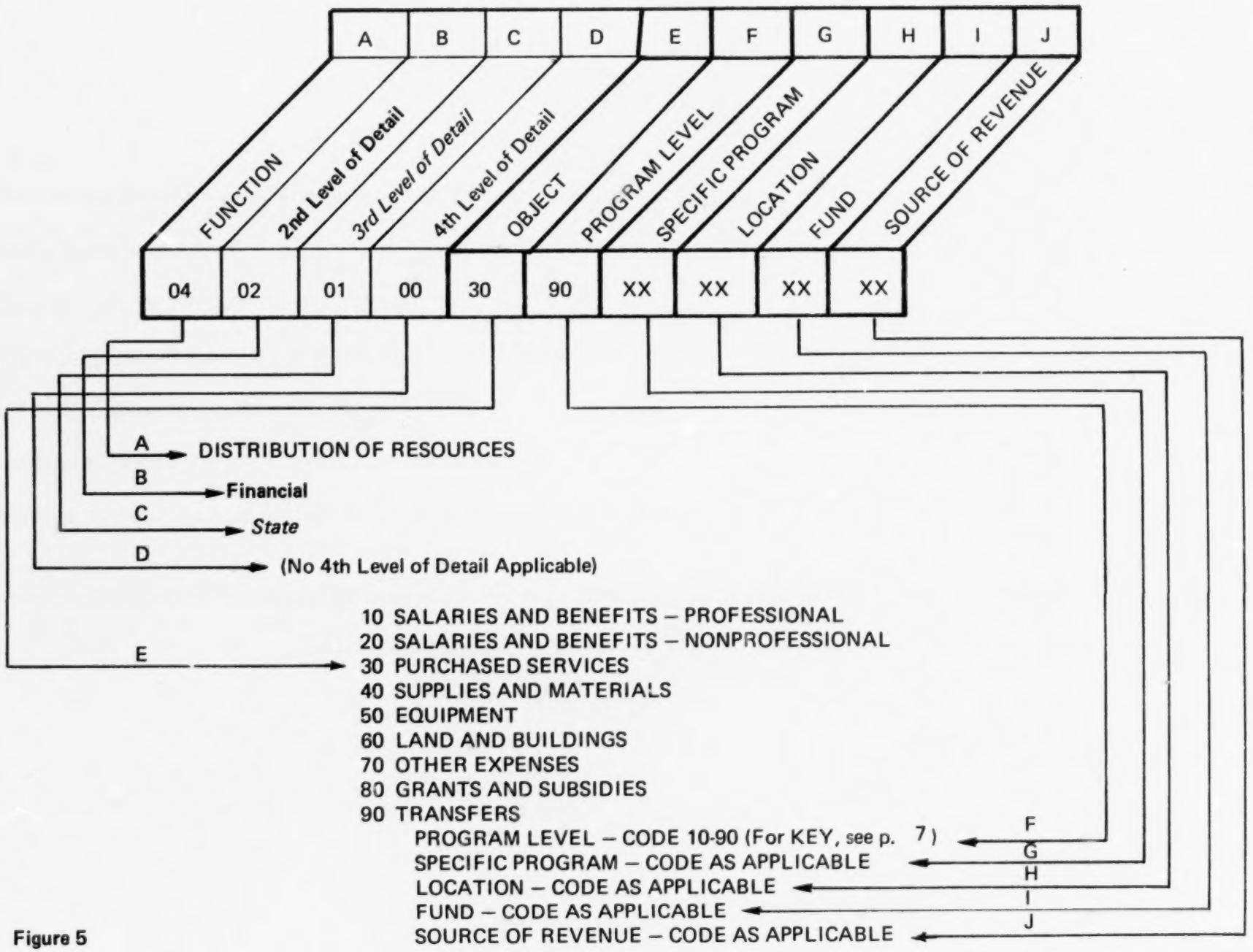

Figure 5

Figure 5

Payment for Contracted Legal Services Relating to Distribution of State Financial Grants

A. This expenditure is charged to the **MAJOR FUNCTION** (A) of DISTRIBUTION OF RESOURCES and is coded 04 (see 03.00 00 00 00 SERIES beginning on page 10).

B. The **2nd Level of Detail** (B) is **Financial** and is coded 02.

C. The *3rd Level of Detail* is *State* and is coded 01.

D. The 4th Level of Detail (D) is not applicable in this case and hence is coded with zeros.

E. The Object (E) is Purchased Services and is coded 30.

F. The Program Level (F) is undistributed (since this particular expenditure cannot be charged to any specific instructional level) and is coded 90.

G-J. The Specific Program (G), Location (H), Fund (I), and Source of Revenue (J) are coded as applicable.

The code number for this particular expenditure would be 04 02 01 00 30 90 XX XX XX XX.

Salary for Payroll Clerk—Nonprofessional

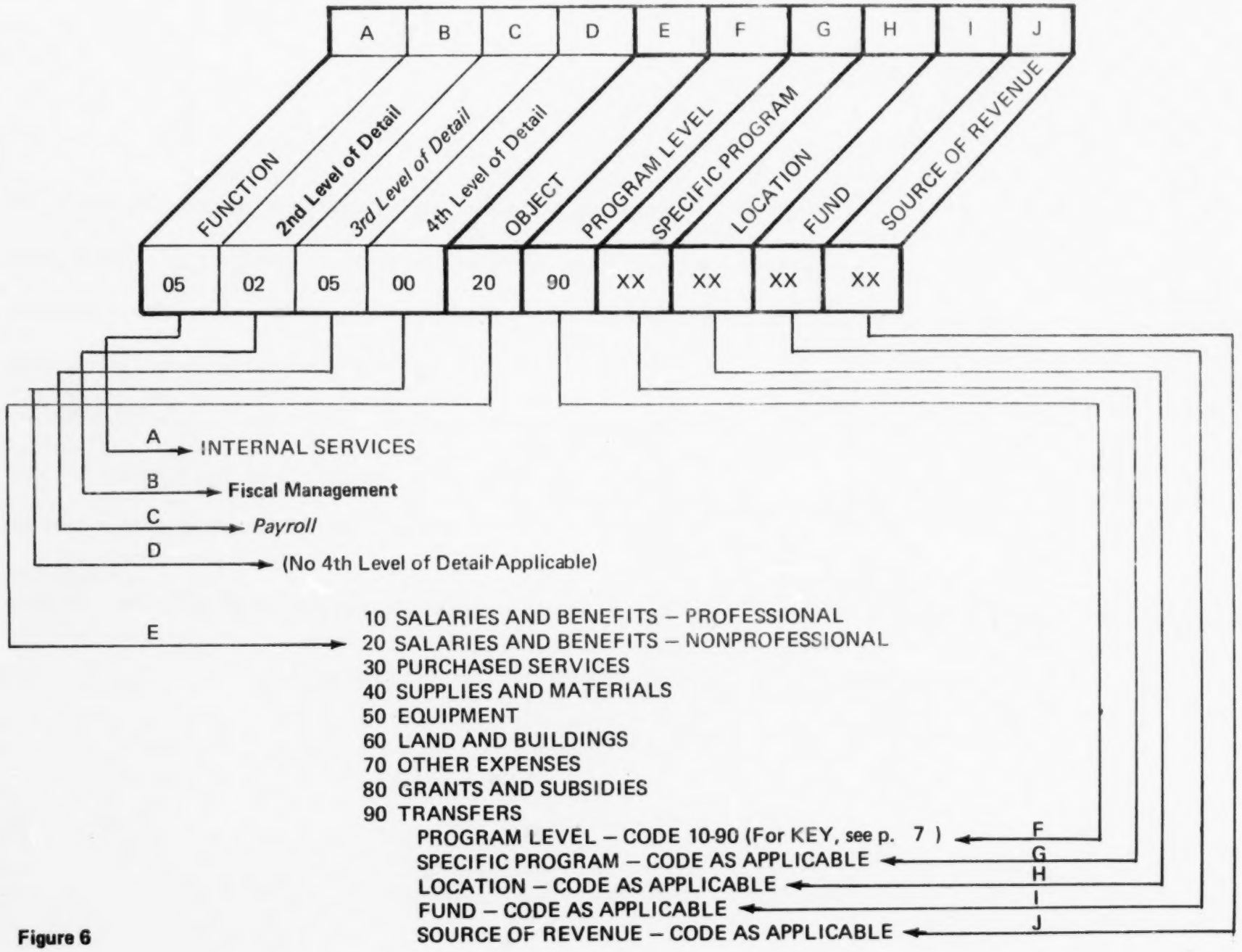
A B C D E F G H I J
FUNCTION
2nd Level of Detail
3rd Level of Detail
4th Level of Detail
OBJECT
PROGRAM LEVEL
SPECIFIC PROGRAM
LOCATION
FUND
SOURCE OF REVENUE
05 02 05 00 20 90 XX XX XX XX
A INTERNAL SERVICES
B Fiscal Management
C Payroll
D (No 4th Level of Detail Applicable)
E
10 SALARIES AND BENEFITS – PROFESSIONAL
20 SALARIES AND BENEFITS – NONPROFESSIONAL
30 PURCHASED SERVICES
40 SUPPLIES AND MATERIALS
50 EQUIPMENT
60 LAND AND BUILDINGS
70 OTHER EXPENSES
80 GRANTS AND SUBSIDIES
90 TRANSFERS
PROGRAM LEVEL – CODE 10-90 (For KEY, see p. 7) F
SPECIFIC PROGRAM – CODE AS APPLICABLE G
LOCATION – CODE AS APPLICABLE H
FUND – CODE AS APPLICABLE I
SOURCE OF REVENUE – CODE AS APPLICABLE J

Figure 6

Figure 6

Salary for Payroll Clerk—Nonprofessional

A. This expenditure is charged to the **MAJOR FUNCTION** (A) of INTERNAL SERVICES and is coded 05 (see 03.00 00 00 00 SERIES beginning on page 10).

B. The **2nd Level of Detail** (B) is **Fiscal Management** and is coded 02.

C. The *3rd Level of Detail* (C) is *Payroll* and is coded 05.

D. The 4th Level of Detail (D) is not applicable in this case and hence is coded with zeros.

E. The Object (E) is Salaries and Benefits—Nonprofessional and is coded 20.

F. The Program Level (F) is undistributed (since this particular expenditure cannot be charged to any specific instructional level) and is coded 90.

G-J. The Specific Program (G), Location (H), Fund (I), and Source of Revenue (J) are coded as applicable.

The code number for this particular expenditure would be 05 02 05 00 20 90 XX XX XX XX.

Purchase of Building to be Used as a School for the Deaf

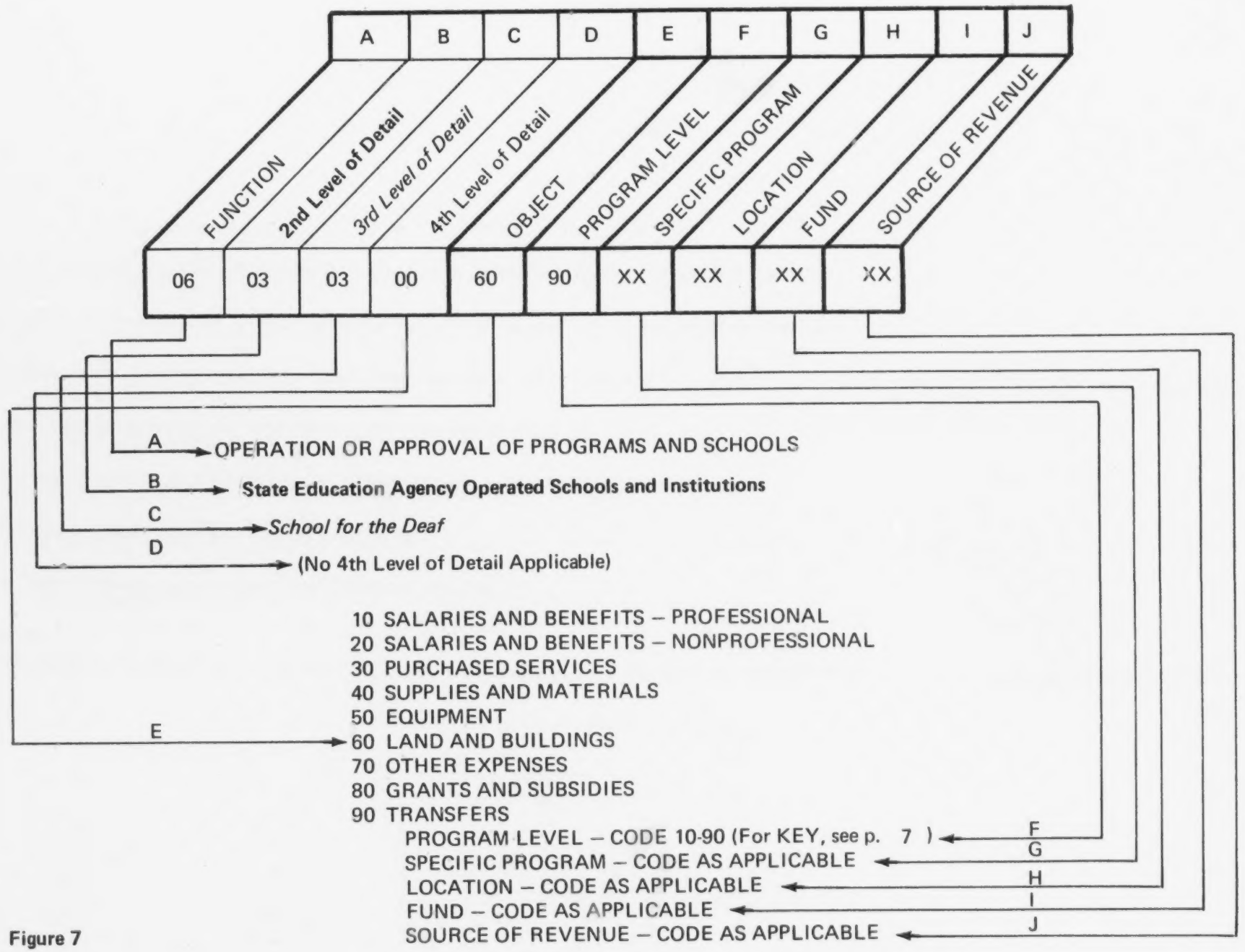

Figure 7

Figure 7

Purchase of Building to be Used as a School for the Deaf

A. This expenditure is charged to the **MAJOR FUNCTION** (A) of OPERATION OR APPROVAL OF PROGRAMS AND SCHOOLS and is coded 06 (see 03.00 00 00 00 SERIES beginning on page 10).

B. The **2nd Level of Detail** (B) is **State Education Agency Operated Schools and Institutions** and is coded 03.

C. The *3rd Level of Detail* (C) is *School for the Deaf* and is coded 03.

D. The 4th Level of Detail (D) is not applicable in this case and hence is coded with zeros.

E. The Object (E) is Land and Buildings and is coded 60.

F. The Program Level (F) is undistributed (since this particular expenditure cannot be charged to any specific instructional level) and is coded 90.

G-J. The Specific Program (G), Location (H), Fund (I), and Source of Revenue (J) are coded as applicable.

The code number for this particular expenditure would be 06 03 03 00 60 90 XX XX XX XX.

Distribution of a State Minimum Foundation Grant to a Local Education Agency
(Flow-through)

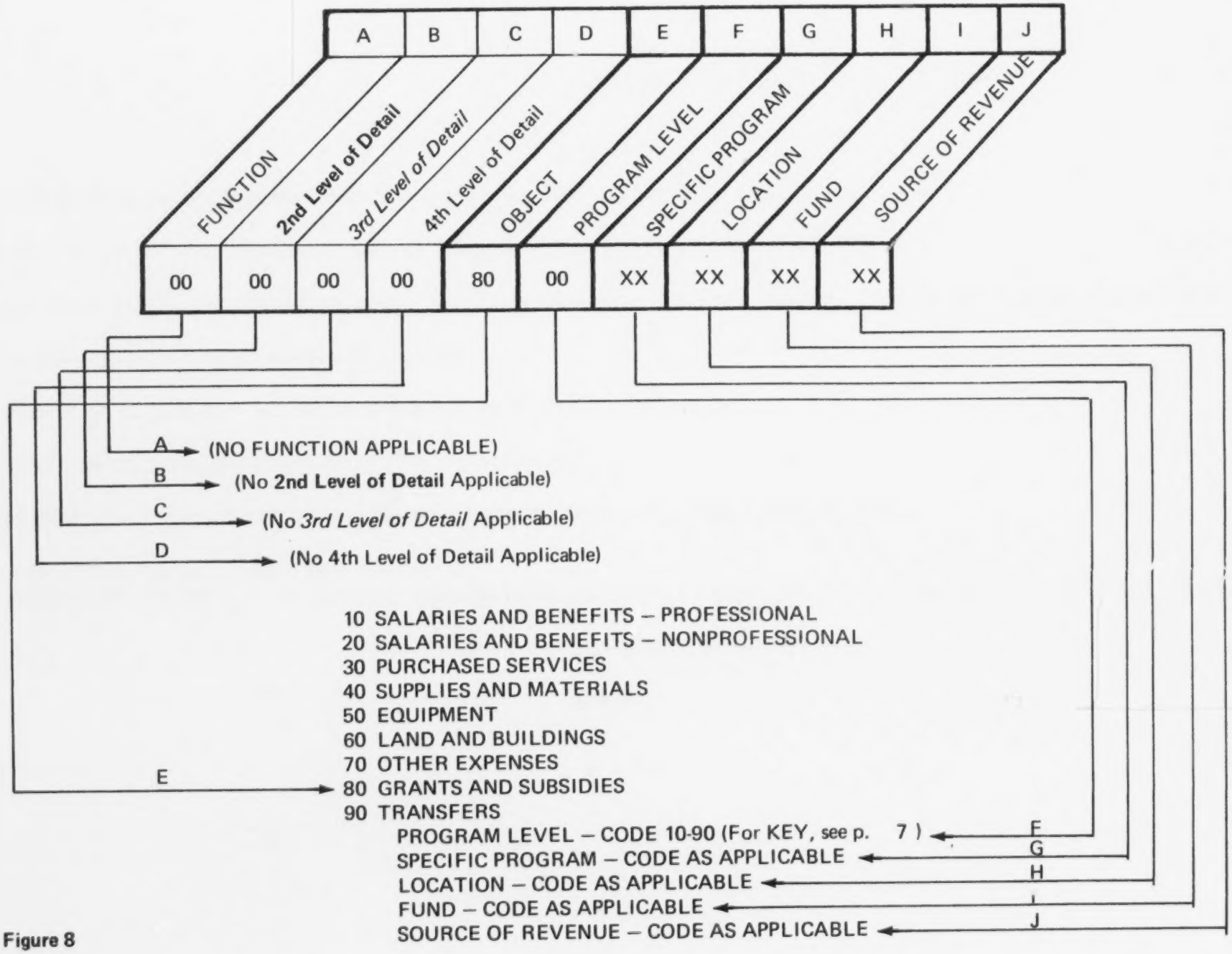

Figure 8

Figure 8

Distribution of a State Minimum Foundation Grant to a Local Education Agency
(Flow-through)

A-D. Since this expenditure is solely for the purpose of distributing flow-through money, neither the MAJOR FUNCTION nor any of the levels of detail are applicable. Therefore, these four columns are coded with zeros.

E. The Object (E) is Grants and Subsidies and is coded 80.

F. The Program Level (F) is not applicable in this case and hence is coded with zeros.

G-J. The Specific Program (G), Location (H), Fund (I), and Source of Revenue (J) are coded as applicable.

The code number for this particular expenditure would be 00 00 00 00 80 00 XX XX XX XX.

Chapter 4

DEFINITIONS OF ITEMS OF INFORMATION ABOUT STATE EDUCATION AGENCIES

This chapter covers the definitions of the items of information which are identified and classified in chapter 2. The classifications and the numbers of the items in this chapter are identical with those in chapter 2. The varied typography of the item headings indicates the level of detail of the item.

Wherever possible, the definitions of the items of information in this handbook are in keeping with accepted practice. A variety of methods of definition has been employed to achieve clarity and usefulness. In many instances a definition must be read in the context of its classification in chapter 2 and interpreted within the scope of this handbook if it is to be clearly understood.

IDENTIFICATION AND FUNCTIONS OF STATE EDUCATION AUTHORITY

02.00 00 00 00

Information items in this section are concerned with all State education authorities—their identification and what they do. A State education authority is an organized and officially constituted group of individuals or an individual responsible for policy decisions based upon constitutional and legislative provisions pertinent to education within the State.

02.01 00 00 00 IDENTIFICATION OF STATE EDUCATION AUTHORITY

The listing of those State agencies which qualify as State education authorities.

02.01 01 00 00 **State Education Agencies**

The organizations established by law for the primary purpose of carrying out at least a part of the educational responsibilities of the State. They are characterized by statewide jurisdiction and may be composed of a State board, chief executive officer, and staff. Some State education agencies may lack one or two of these three elements, but in any case there must be either a board or a chief executive officer. The term "commission" is sometimes used synonymously with "board."

02.01 01 01 00 *State Board of Education*

The legally constituted body having the major responsibility for the general supervision of elementary and secondary education in the State. This board may also have total or partial responsibility for such areas as higher education, vocational education, and vocational rehabilitation.

02.01 01 02 00 *State Board for Vocational Education*

The legally constituted body which formulates policy for the vocational education program in the State. In some cases, the State Board of Education may also serve as the State Board for Vocational Education.

02.01 01 03 00 *State Board for Higher Education*

The legally constituted body which formulates policy for education above the level of the secondary school. This level may begin with grade 13 and is usually provided by colleges, universities, graduate schools, professional schools, and technical institutes.

02.01 01 99 00 *Other State Education Agencies*

Any State education agencies not included above.

02.01 02 00 00 **Other State Governmental Agencies Having Educational Functions**

State governmental agencies which have education-related responsibilities, but whose primary purpose is not that of education. Examples are the State Highway Commission, the State Controller's Office, and the State Library Board.

02.01 02 01 00 *State Board for Vocational Rehabilitation*

The legally constituted body which has primary responsibility for policy formulation regarding vocational rehabilitation in the State. In some cases, the State Board of Education may also serve as the State Board for Vocational Rehabilitation.

02.01 02 02 00 *State Health Board or Commission*

The legally constituted body which is primarily responsible for the promotion and maintenance of optimum health conditions within a State.

02.01 02 03 00 *State Welfare Board or Commission*

The legally constituted body which is primarily responsible for welfare activities within the State.

02.01 02 04 00 *State Labor Board or Commission*

The legally constituted body which is primarily responsible for labor relations and labor conditions within the State.

02.01 02 99 00 *Other: Other State Governmental Agencies Having Educational Functions*

Any State governmental agencies, in addition to those listed above, which have some responsibility or authority relating to education in the State.

02.01 99 00 00 **Other Identification of State Education Authority**

Any State education authority not identified above.

02.02 00 00 00 FUNCTIONS OF STATE EDUCATION AUTHORITY

Those functions which are actually carried out by the several State education authorities.

02.02 01 00 00 **Functions of State Education Agencies**

All functions carried out by the State education agencies. *See also* STATE EDUCATION AGENCY.

02.02 01 01 00 *Activities of State Board of Education*

All activities carried out by the State Board of Education. *See also* STATE BOARD OF EDUCATION.

02.02 01 01 01 Development of Policies on Agency Role and Function

Policy formulation regarding the mission and operation of the State education agency.

02.02 01 01 02 Development of Policies on Educational Program

Policy formulation regarding the State's goals for education, the State's leadership role, the State's evaluation function, and the education program elements.

02.02 01 01 03 Development of Policies on School District Organization

Policy formulation pertaining to the State responsibility for local school governance. Examples are criteria for organization and reorganization of local school administrative units.

02.02 01 01 04 Development of Policies on Pupils

Policy formulation on all matters relating to pupils. Examples are: admission and attendance, assignment, transportation, school food services, and welfare of pupils.

02.02 01 01 05 Development of Policies on School Personnel

Policy formulation on all matters relating to school personnel. Examples are: certification and licensure standards, certification and licensure administration, relations with employee organizations, preservice preparation, inservice education, and remuneration.

02.02 01 01 06 Development of Policies on School Buildings and Sites

Policy formulation on all matters relating to school facilities such as State responsibility for safety and

welfare of pupils, school facilities planning and construction, school facility use, and financial aid for school construction.

02.02 01 01 07 Development of Policies on Relationship with the Public, Other Agencies, and Institutions

Policy formulation regarding relationship with both governmental and nongovernmental agencies and institutions.

02.02 01 01 08 Development of Policies on Finance

Policy formulation regarding State responsibility for financing public education, sources of funds, and distribution and control of funds.

02.02 01 01 09 Development of Policies on State Education Agency Employment Practices

Policy formulation regarding State education agency personnel, including guidelines and procedures to govern appointment or dismissal of such personnel.

02.02 01 01 50 Negotiations

Those activities whereby, under authority of law, the State Board of Education mediates or adjudicates disputes. An example would be that of salary disputes between teacher organizations and local school administrative bodies.

02.02 01 01 51 Judiciary

Those activities whereby the State Board of Education serves as a court of appeals on certain questions arising under the law, interprets the law, institutes legal proceedings, and decides controversies.

02.02 01 01 52 Budget Review

Those activities whereby, under authority of State law, the State Board of Education reviews and approves or disapproves the proposed budget of local school administrative units. This item includes review and adoption of the budget for the State department of education.

02.02 01 01 53 Evaluation

Those activities concerned with ascertaining or judging the value or amount of an action or an outcome of previously specified data in light of the particular situation and the goals and objectives previously established.

02.02 01 01 99 Other Activities of State Board of Education

Any activities of the State Board of Education not listed above. Examples are: jurisdiction over public or district school libraries, appointment of local school officials, awarding of scholarships, and recommending appropriate school legislation to the State legislature.

02.02 01 02 00 *Activities of State Board for Vocational Education*

Those activities, usually policymaking in nature, which relate to the State program of vocational education.

02.02 01 03 00 *Activities of State Board for Higher Education*

Those activities, usually policymaking in nature, which relate to higher education.

02.02 01 99 00 *Other Functions of State Education Agencies*

Any functions of State education agencies not listed above.

02.02 02 00 00 **Functions of Other State Governmental Agencies Having Educational Functions**

Functions of all State governmental agencies having educational functions and not listed above.

02.02 02 01 00 *Activities of State Board for Vocational Rehabilitation*

Those activities, usually policymaking in nature, but possibly administrative or operational, which relate to the State program for vocational rehabilitation.

02.02 02 02 00 *Activities of State Health Board or Commission*

Those activities of the State Health Board or Commission which are related to education in the State.

02.02 02 03 00 *Activities of State Welfare Board or Commission*

Those activities of the State Welfare Board or Commission which are related to education in the State.

02.02 02 04 00 *Activities of State Labor Board or Commission*

Those activities of the State Labor Board or Commission which are related to education in the State.

02.02 02 99 00 *Other Functions of Other State Governmental Agencies Having Educational Functions*

Those activities pertaining to education of other State governmental agencies not listed above.

02.02 99 00 00 **Other Functions of State Education Authority**

Any other functions of State education authority not listed above.

FUNCTIONS OF STATE DEPARTMENTS OF EDUCATION

03.00 00 00 00

This section of the handbook encompasses those activities which are normally carried out by a State department of education. Obviously, not all State departments will engage in all activities listed under these functions. For the purposes of this handbook, the functions are divided into six major categories: (1) General Management, (2) Planning, Research, Development, and Evaluation, (3) Consultative Services, (4) Distribution of Resources, (5) Internal Services, and (6) Operation or Approval of Programs and Schools.

A State department of education is composed of a chief executive officer (chief State school officer) and staff, and exists to conduct the work assigned to it by law or by board policy.

03.01 00 00 00 GENERAL MANAGEMEENT

This major function consists of those activities which have as their purpose the general regulation, direction, execution, and control of the affairs of the State department of education which are departmentwide and not confined to any one organizational unit within the department.

03.01 01 00 00 **Activities of Office of Chief Executive Officer**

Those executive activities of the chief State school officer (State Superintendent of Education, State Superintendent of Public Instruction, etc.) which are concerned with discharging the duties assigned to him by law or by board policy.

03.01 01 01 00 *Policy Development*

Policy formulation which takes place at the level of the chief executive officer. Part of this policy relates directly to the internal operation of the department for which he is responsible. Other policy may be developed at the executive level to be submitted in turn to a State board for final adoption.

03.01 01 02 00 *Policy Implementation*

The carrying out, either directly or by delegated authority, of those policies which have been developed and adopted.

03.01 01 03 00 *Internal Coordination*

The establishment and maintenance of communication channels and accord among the several organizational units within the department.

Organizational patterns vary widely among the several State departments of education. Regardless of the organizational pattern, however, it is essential that personnel in each organizational unit know what is happening in other units in order that all may be working toward the implementation of those policies which have been developed and adopted.

03.01 01 04 00 *Coordination With Other State Agencies*

The establishment and maintenance of communication channels with other State agencies.

As a part of the State governmental complex, the State department of education does not exist in isolation. It is necessary to constantly coordinate with other State agencies, especially those which have some bearing, either directly or indirectly, upon the educational program of the State.

03.01 01 05 00 *Coordination With Nongovernmental Agencies*

The establishment and maintenance of communication channels with nongovernmental agencies.

Coordination with agencies and organizations outside the government is an essential activity. This activity should include communication and cooperation with such organizations as parent-teachers' association, State taxpayers' association, State school board association, and State teachers' association.

03.01 01 06 00 *State-Federal Relations*

Those essential activities pertaining to communication and coordination with the Federal Government regarding such matters as funded programs and statistical reporting.

03.01 01 07 00 *State-Local Relations*

Those executive level activities which have as their objective better rapport between the State and local educational levels. These activities are not in any way limited to the regulatory functions of the State department of education as required by law.

03.01 01 08 00 *Interstate Relations*

Those activities pertaining to communication and coordination with the State education agencies in other States.

03.01 01 09 00 *Public Relations*

Activities concerned with establishing, maintaining, and improving the relations among various elements of the State educational system, and between the educational system and its environment, through personal contact and the use of all information media.

03.01 01 10 00 *Human Rights*

Those activities directed toward the elimination of want, religious discrimination and racial discrimination, and the furtherance of equal educational and employment opportunities.

03.01 01 11 00 *Legislative Liaison*

Coordination with the State legislature in the preparation of educational legislation, providing information to legislative committees and members, and testifying before such committees. Many of these same activities would apply to coordination with Congress at the Federal level.

03.01 01 12 00 *Personnel Negotiations*

Those activities by which the chief executive, when authorized by law or requested by concerned parties, mediates or adjudicates disputes at the local level regarding such matters as tenure, salaries, and working conditions.

03.01 01 13 00 *Judiciary*

Those activities by which the chief executive officer, by virtue of authority granted by law, State board policy, or regulation, holds hearings and renders decisions regarding education-related controversies within the State.

03.01 01 99 00 *Other Activities of Office of Chief Executive Officer*

Any activities of the chief executive officer which are not listed and defined above.

03.01 02 00 00 **Activities of Office of Deputy or Assistant Chief Executive Officer (when not chargeable to other functions)**

Those executive activities of the deputy or assistant chief State school officer in discharging the duties assigned by law or by board policy. This item applies

only to departmentwide functions of a deputy or assistants and does not apply to those activities related only to one specific function or organizational unit.

03.01 03 00 00 **Developing State Agency Staff Competencies**

Activities having as a primary goal the better performance of the tasks to which staff members are assigned.

03.01 03 01 00 *Preservice Orientation and Training*

Activities which are carried out prior to actual employment and which are intended to result in more efficient performance.

03.01 03 02 00 *Professional Leave*

Activities concerned with providing leave for employees, generally with all or part of their salary paid, for the purpose of professional improvement.

03.01 03 03 00 *Fellowships, Internships, and Traineeships*

Activities concerned with provision, through colleges, universities, or other agencies and institutions, for the improvement of State education agency professional staff.

03.01 03 04 00 *Institutes, Workshops, Conferences, and Special Courses*

Activities concerned with the provision of short term or group experiences for improvement of State education agency staff competencies.

03.01 03 99 00 *Other Programs to Develop State Agency Staff Competencies*

Any programs for developing State agency staff competencies which are not listed and defined above.

03.01 99 00 00 **Other General Management**

Any general management functions not listed and defined above.

03.02 00 00 00 PLANNING, RESEARCH, DEVELOPMENT, AND EVALUATION

Activities related to a systematic procedure for the functioning of the agency and component units as they are related to each other and to other agencies with similar goals and objectives for the purposes of (1) identifying needs, determining purposes, and making decisions regarding the means by which desired outcomes may be obtained, (2) making inquiries and searches to find better procedures to accomplish newer objectives that appear to be desirable, (3) demonstrating promising innovation, and (4) making assessments and objective measurements of achievements or products.

03.02 01 00 00 **Management of Planning, Research, Development, and Evaluation**

Activities concerned with the administration of the specific function of planning, research, development, and evaluation.

03.02 02 00 00 **Planning**

The selection or identification of the overall, long-range goals, priorities, and objectives of the agency, and the formulation of various courses of action in terms of identification of needs and relative costs or benefits for the purpose of deciding on courses of action to be followed in working toward achieving those goals, priorities, and objectives.

03.02 02 01 00 *Interagency*

Planning which involves other agencies or organizations, both governmental and nongovernmental, at all levels.

03.02 02 02 00 *Intra-agency*

Planning which involves the several organizational units within the State agency.

03.02 02 99 00 *Other Planning*

Other planning activities not listed and defined above.

03.02 03 00 00 **Research**

Systematic study and investigation in some field of knowledge, undertaken to establish facts or principles.

03.02 03 01 00 *Comprehensive Research (Other Than Curriculum)*

Research relating to State educational programs on a broad nonspecific basis.

03.02 03 02 00 *Specific Research (Other Than Curriculum)*

Research pertaining to specific aspects of education (other than curriculum) in the State.

03.02 03 02 01 State Education Agency Programs

Research regarding programs which are now being operated by the State education agency or which it may operate at some time in the future.

03.02 03 02 02 Legal and Organizational Structure

Research pertaining to the legal and organizational structure for the educational program within the State. This may apply either to the State or local level.

03.02 03 02 03 Administration and Management

Research concerning the general direction and control of education within the State.

03.02 03 02 04 Financing

Research concerning methods of financing the educational program of the State.

03.02 03 02 05 School Facilities

Research concerning school buildings, sites, improvements, and equipment.

03.02 03 02 06 Pupil Achievement

Research concerning the achievement of pupils throughout the State.

03.02 03 02 07 Staffing of Educational Programs

Research concerning the staffing for educational programs.

03.02 03 02 99 Other Specific Research (Other Than Curriculum)

Research activities relating to any specific area not listed and defined above.

03.02 03 03 00 *Curriculum Research*

Research pertaining to the curriculum, including content, methodology, media, and supporting services.

03.02 03 99 00 *Other Research*

Other research activities not listed and defined above.

03.02 04 00 00 **Development**

Activities concerned with the evolving process of utilizing the products of research and considered judgment in the deliberate improvement of educational programs.

03.02 04 01 00 *Centers for Demonstration and Innovation*

Activities concerned with the establishment and operation of centers, statewide or on a regional basis, for demonstrating the use of the results of research and for bringing about new and improved methods of curriculum development and implementation.

03.02 04 02 00 *Dissemination of Information*

Activities concerning the use of all communication media to disseminate the results of study, research, and evaluation to the legislature, the educational community, and the general public.

03.02 04 99 00 *Other Development*

Other developmental activities not listed and defined above.

03.02 05 00 00 **Evaluation**

The process of ascertaining or judging the value or amount of an action or an outcome by careful appraisal of previously specified data in light of the particular situation and the goals and objectives previously established.

03.02 05 01 00 *Interagency*

Evaluation which involves other agencies and organizations, both governmental and nongovernmental, at all levels.

3.02 05 02 00 *Intra-agency*

Evaluation which involves the several organizational units within the State agency.

03.02 05 99 00 *Other Evaluation*

Other evaluation activities not listed and defined above.

03.02 06 00 00 **Management Information System**

As used in this handbook, a method for providing information regarding the agency's participation in educational efforts within the State, a method for determining the amounts of effort invested by a State education agency in each of the things done by the agency itself, and a method for providing comprehensive information upon which logical management decisions can be based.

03.02 06 01 00 *Statistical Services*

Services concerned with collecting, organizing, summarizing, analyzing, and disseminating educational data pertinent to various educational interests, including pupils, staff, instruction, facilities, finance, and the community.

03.02 06 02 00 *Systems Analysis*

Activities involving the search for alternatives and an evaluation of alternatives which are relevant to defined objectives, based on judgment, and, wherever possible, on quantitative methods; the development of data processing procedures or application to electronic data processing equipment.

03.02 06 99 00 *Other Management Information System*

Other management information activities not listed and defined above.

03.02 99 00 00 **Other Planning, Research, Development, and Evaluation**

Other activities related to planning, research, development, and evaluation which are not listed and defined above.

03.03 00 00 00 CONSULTATIVE SERVICES

Activities concerned with the continuous diffusion of methods, procedures, and practices essential to the implementation of tested improvements or innovations in education.

03.03 01 00 00 **Management of Consultative Services**

Those activities concerned with the administration of the specific function of consultative services.

03.03 02 00 00 **Instructional Consultative Services**

Activities concerned with the continucus diffusion of methods, procedures, and practices essential to implementation of improvements in instruction in the several subject matter areas. (See 03.03 02 03 00 through 03.03 02 03 99.)

03.03 02 01 00 *General Area*

Consultative activities usually concerned with all of the subject matter areas within the respective instructional levels.

03.03 01 01 10 Elementary

Includes education in the prekindergarten, kindergarten, and years or grades 1 through 6, 7, or 8. The terminal elementary year or grade (6, 7, or 8) is usually determined by State law or regulation.

03.03 02 01 30 Secondary

Includes education provided in any span of years or grades beginning with the next year or grade

following the elementary school and ending with or below grade 12, including the junior high school and other types of high school.

03.03 02 01 50 Postsecondary

Instruction and training programs provided for students who have graduated from a secondary school. This instructional level includes college programs of one or more years duration and other programs designed to meet the unique needs of youths and adults who wish to pursue a specified educational objective as a continuation of their formal education.

03.03 02 01 70 Adult Education

Instruction and services designed to meet the unique needs of adults and youth—beyond the age of compulsory school attendance—who have either completed or interrupted their formal education. This may be provided by a school system, college, or other agency or institution through activities and media such as formal classes, correspondence study, radio, television, lectures, concerts, demonstrations, and counseling.

03.03 02 01 90 Other General Area

Other general educational programs not included in those listed and defined above.

03.03 02 02 00 *Differentiated Curriculum*

Consultative services for a program of educational offerings designed to meet the unique needs of pupils comprising special target populations.

03.03 02 02 01 Bilingual Education

A program of instruction and services designed for pupils who, due to non-English speaking home, school, or community backgrounds, have difficulty in school work.

03.03 02 02 02 Education for the Disadvantaged

A program of instruction and services for those children whose educational development is retarded by social, cultural, or economic deprivation. Principally affected are: children from low income families, children from minority groups which have experienced discrimination, children from families of migrant workers, American Indian children, and children living in homes for the neglected and delinquent.

03.03 02 02 03 Education for the Gifted

A program of instruction and services for those pupils who exhibit one or more of such characteristics as superior academic achievement or ability, talent in art, music, drama, or other aesthetic areas, mechanical ability, and potential for leadership.

03.03 02 02 04 Education for the Handicapped

A program of instruction and services for those children whose physical, mental, or emotional disabilities necessitate the provision of special programs to meet their individual needs.

03.03 02 02 05 Migrant Education

A program of instruction and services for those children who move periodically with their families from one school district to another in order that a parent or other member of the immediate family may secure seasonal employment.

03.03 02 02 06 Urban Education

A program of instruction and services for those pupils who live in the cities, especially in core areas.

03.03 02 02 99 Other Differentiated Curriculum

Consultative services for the instructional program in any differentiated curriculum not listed and defined above.

03.03 02 03 00 *Subject Matter Area*

Consultative services for a grouping of related subjects or units of subject matter under a heading such as English (language arts), foreign languages, music, natural sciences, industrial arts, home economics, agriculture, business, physical education, and trades and industrial occupations.

(The definitions of the several subject matter areas which appear below have been taken directly from

ERIC 104

Handbook VI, *Standard Terminology for Curriculum and Instruction in Local and State School Systems.* For the sake of brevity in this handbook, some definitions have been shortened. For complete definitions see Handbook VI.)

03.03 02 03 01 Agriculture

Agriculture is comprised of the group of related courses or units of subject matter which are organized for carrying on learning experiences concerned with preparation for or upgrading in occupations requiring knowledge and skills in agricultural subjects. . . .

03.03 02 03 02 Art

Art is comprised of the organized body of subject matter or related courses involving primarily visual, tactile, and kinesthetic expression. . . . Emphasis is placed upon aesthetic and creative factors of visual forms.

03.03 02 03 03 Business

Business includes the body of related subject matter, or related courses, and planned learning experiences which are designed to develop in pupils the attitudes, knowledge, skills, and understanding concerned with business principles and practices having applications for personal use and/or activities in the business world. . . .

03.03 02 03 04 Distributive Education (Distribution and Marketing)

Distributive education includes various combinations of subject matter and learning experiences related to the performance of activities that direct flow of goods and services, including their appropriate utilization, from the producer to the consumer or user. These activities include selling, and such sales-supporting functions as buying, transporting, storing, promoting, financing, marketing research and management.

033.03 02 03 05 English (Language Arts)

English (Language Arts) is comprised of the body of related subject matter, or the body of related courses, organized for carrying on learning experiences concerned with developing (1) an understanding of the language system, (2) proficiency and control in the use of the English language, (3) appreciation of a variety of literary forms, (4) understanding and appreciation of various aspects of past and present cultures as expressed in literature, and (5) interests which will motivate life-long learning. (Reading is a part of this subject matter area.)

03.03 02 03 06 Foreign Languages

A body of subject matter in this area is comprised of a variety of foreign languages, including English as a foreign language. Classified under this heading are the various classifical and modern foreign languages. . . .

03.03 02 03 07 Health Occupations Education

Education for health occupations comprises the body of related subject matter, or the body of related courses, and planned experiences designed to impart knowledge and develop understandings and skills required to support the health professions. . . .

03.03 02 03 08 Health and Safety in Daily Living, Physical Education, and Recreation

The body of related subject matter and activities in health and safety in daily living, physical education, and recreation are organized for carrying on learning experiences concerned with developing (1) knowledge, attitudes, appreciations, and conduct essential to individual and group health; (2) awareness of, concern for, and knowledge, skills, and judgment necessary for practicing and promoting personal and public safety in the home, at school, on the job, and in traffic; and (3) physical and mental growth and fitness by means of activities designed to improve the muscles, motor skills, and attitudes and habits of conduct of individuals and groups.

03.03 02 03 09 Home Economics

Home economics comprises the group of related courses or units of instruction organized for purposes of enabling pupils to acquire knowledge and develop understanding, attitudes, and skills relevant to (a) personal, home, and family life, and (b) occupational preparation using the knowledge and skills of home economics. The subject matter of home economics

105

includes, in addition to that which is unique to the area, concepts drawn from the natural and social sciences and the humanities.

03.03 02 03 10 Industrial Arts

Industrial arts is the body of related subject matter, or related courses, organized for the development of understanding about the technical, consumer, occupational, recreational, organizational, managerial, social, historical, and cultural aspects of industry and technology. . . .

03.03 02 03 11 Mathematics

Mathematics comprises the body of related subject matter, or the body of related courses, organized for carrying on learning experiences concerned with the science of relations existing between quantities (magnitude) and operations and the science of methods used for deducing from other quantities, known or supposed, the quantities sought.

03.03 02 03 12 Music

Music is the fine art that utilizes sounds in time in a meaningful and organized manner. Subject matter and activities in music are designed to impart the skills and knowledge necessary for the understanding, appreciation, creation, performance, and enjoyment of music.

03.03 02 03 13 Natural Sciences

The natural sciences include the body of related subject matter, or the body of related courses, organized for carrying on learning experiences concerned with knowledge of the physical and biological world, and of the processes of discovering and validating this knowledge.

03.03 02 03 14 Office Occupations

This body of subject matter, or combinations of courses and practical experience, is organized into programs of instruction to provide opportunities for pupils to prepare for and achieve career objectives in selected office occupations. . . .

03.03 02 03 15 Safety and Driver Education

The subject matter and related activities in safety and driver education are organized for carrying on learning experiences concerned with developing in the learner the ability to respond appropriately and efficiently in the operation of a motor vehicle, and as a pedestrian in traffic. . . .

03.03 02 03 16 Social Sciences or Social Studies

The social sciences or social studies are comprised of interrelated subject matter organized to impart knowledge, develop skills, and identify goals concerning elements and institutions of human society in the disciplines of history, economics, political science, sociology, anthropology, psychology, geography, and philosophy.

03.03 02 03 17 Technical Education

Technical education is concerned with that body of knowledge organized in a planned sequence of classroom and laboratory experiences, usually at the postsecondary level, to prepare pupils for a cluster of job opportunities in a specialized field of technology. The program of instruction normally includes the study of the underlying sciences and supporting mathematics inherent in a technology, as well as methods, skills, materials, and processes commonly used and services performed in the technology. . . .

03.03 02 03 18 Trade and Industrial Occupations

Trade and industrial occupations is the branch of vocational education which is concerned with preparing persons for initial employment, or for upgrading or retraining workers in a wide range of trade and industrial occupations. Such occupations are skilled or semiskilled and are concerned with layout designing, producing, processing, assembling, testing, maintaining, servicing, or repairing any product or commodity. . . .

03.03 02 03 99 Other Subject Matter Area

03.03 02 04 00 *Interdisciplinary Study and Activities*

Consultative services for an interrelated combination of content from two or more subject matter areas or

disciplines and allied activities designed to foster individual understanding of the culture and the environment.

03.03 02 04 01 Cocurricular Activities

Cocurricular activities (experiences) are comprised of the group of school-sponsored activities, under the guidance or supervision of qualified adults, designed to provide opportunities for pupils to participate in such experiences on an individual basis, in small groups, or in large groups—at school events, public events, or a combination of these—for purposes such as motivation, enjoyment, and improvement of skills. . . .

03.03 02 04 02 Humanities

Subject matter—which may embrace literature, languages, history, music, art, and philosophy (or any combination of these)—planned to acquaint man with his origins and neighbors, including the thoughts, creations, and actions of his predecessors through the ages. The humanities are a record of what man over the centuries has felt, thought, and done in his search for answers to questions about human concerns such as personal identity, origins, meaning of life, and destiny.

03.03 02 04 03 Environmental Education

An instructional program comprising a group of activities designed to provide opportunities for pupils to participate in experiences which will preserve and improve local, State, and national resources—both natural and manmade.

03.03 02 04 04 Occupational Exploration

Instructional programs which focus attention on a group of occupations related to student interests. Generally these programs are designed to refine career choice by providing the student with an experience which contains one performance cycle of several occupations.

03.03 02 04 05 Individualized Instruction

A program of instruction whereby a curriculum is planned for each student based upon a diagnosis of his individual learning needs and interests, which engages the student in determination of his learning goals and activities, which draws from several disciplines as they are applicable to the attainment of his goals, and which is individually paced.

03.03 02 04 06 Drug Education

The study of the nature of drugs and their effects upon the human body and upon society.

03.03 02 04 99 Other Interdisciplinary Study and Activities

03.03 02 05 00 *Educational Media*

All activities whereby consultative assistance is provided to local and intermediate staff members in the organization and use of all teaching and learning resources, including hardware, content material, and services.

Educational media are defined as any devices, content materials, methods, or experiences used for teaching and learning purposes. These include printed and nonprinted sensory materials.

03.03 02 05 01 School Library Services

Services concerned with providing guidelines for organizing and managing collections of educational media for use by students, faculty, and where appropriate, the community. Includes such activities as ordering or selecting, cataloging, processing, and circulating educational media (which includes provision for use of media within the media center).

03.03 02 05 02 Audiovisual Services

Services concerned with providing guidelines for the selection, ordering, and most efficient use of all equipment essential for proper use of the content materials in the media center and in all teaching and learning situations.

Audiovisual equipment is defined as all aids by means of which the learning process may be encouraged or carried on through the sense of hearing or the sense of sight.

107

03.03 02 05 03 Textbook Services

Services concerned with providing guidelines for the selection and most efficient use of textbooks in the classroom. For purposes of this handbook, a textbook is considered to be a book containing a presentation of the principles of a given subject and used as a *basis* of instruction in that subject.

03.03 02 05 04 Demonstration Centers

Services concerned with the establishment and operation of centers for the purpose of emphasizing the salient merits, utility, and efficiency of teaching materials, equipment, and methods. A demonstration center usually serves a number of schools and school districts and usually is established on a regional or statewide basis.

03.03 02 05 05 Television in Education

Services concerned with the establishment and operation of television systems for the purpose of instruction. This will usually involve a full sequence of lessons over closed circuit or broadcast television.

03.03 02 05 06 Radio in Education

Services concerned with the establishment and operation of radio systems for purposes of instruction. This usually involves a full sequence of lessons.

03.03 02 05 99 Other Educational Media

Any other consultative services, not listed and defined above, which relate to the selection and use of educational media.

03.03 03 00 00 **Pupil Personnel Services**

Services related to a group of professional activities such as guidance and counseling services, health services, psychological services, speech pathology, audiology services, and school attendance or social work or "visiting teacher" services.

03.03 03 01 00 *Guidance*

Guidance services for pupils include activities of counseling pupils and parents, providing consultation with other staff members on learning problems, evaluating the abilities of pupils by standardized testing or other means, assisting pupils to make their own educational career plans and choices, assisting pupils in personal and social development, providing referral assistance, and working with other staff members in planning and conducting guidance programs for pupils. Included are facilities for guidance in counseling, related equipment and supplies, and services provided by counseling personnel.

03.03 03 02 00 *Health*

Services which include all the activities of providing medical, dental, psychiatric, and nurse services to pupils.

0303 03 03 00 *School Psychological*

Services which include the activities of administration of psychological tests, interpretation of the results of psychological tests, working with other staff members in planning school programs to meet special needs of pupils as indicated by psychological tests, and in planning and managing a program of psychological services, including psychological counseling, for the school or school system.

03.03 03 04 00 *Speech Pathology*

Services for the identification of children with speech or language disorders, diagnosis and appraisal of specific speech and language disorders, referral for medical or other professional attention necessary to habilitation of speech or language disorders, provision of required speech habilitation services, and counseling and guidance for children, parents, and teachers, as appropriate to the habilitation of speech and language.

03.03 03 05 00 *School Attendance and Social Work*

Services concerned with school attendance and social work or "visiting teacher" activities for the purpose of improving the attendance of pupils at school, and services concerned with school social work dealing with the problems of pupils which involve the home, school, and community.

198

03.03 03 99 00 *Other Pupil Personnel Services*

Any other pupil personnel services not listed and defined above.

03.03 04 00 00 **Administrative Consultative Services**

Activities concerned with the continuous diffusion of methods, procedures, and practices essential to the implementation of tested improvements in educational administration.

03.03 04 01 00 *Specialized Aspects of Organization, Administration, and Operation of Intermediate and Local Education Agencies*

Services for improvement of management in specific areas such as school plant facilities, pupil transportation, and school food services.

03.03 04 01 01 District and School Organization

Services concerned with management and legal counsel for promotion of effective organization and reorganization of school districts in compliance with State criteria as established by law or regulation.

03.03 04 01 02 Plant Facilities

Services dealing with the construction, operation, and maintenance of school facilities such as land, outdoor improvements, and buildings.

03.03 04 01 03 Pupil Transportation

Services concerned with transporting pupils to and from school, between schools, and to school related activities, including acquisition, allocation, maintenance, and safe operation of equipment.

03.03 04 01 04 School Food Services

Services concerned with the management of the food service program, and the preparation and serving of regular and incidental meals or snacks in connection with school activities. These services may apply to all food service programs regardless of whether they are federally funded.

03.03 04 01 05 Planning

Services concerned with the selection or identification of the overall, long-range goals, priorities, and objectives of the organization, and the formulation of various courses of action in terms of identification of needs and relative costs or benefits for the purpose of deciding on courses of action to be followed in working toward achieving those goals, priorities, and objectives.

03.03 04 01 06 Evaluation

Services concerned with the process of ascertaining or judging the value or amount of an action or an outcome by careful appraisal of previously specified data in light of the particular situation and the goals and objectives previously established.

03.03 04 01 07 Management Information System

Services concerned with a system for providing information regarding the agency's performance and participation in educational efforts; a method for determining the amounts of effort invested in each of the things done by the agency and a method for providing comprehensive information upon which logical management decisions can be based.

03.03 04 01 08 Machine Data Processing

Services concerned with the use of machines and devices in the storing of individual items of information in a form by which they may be rapidly and accurately retrieved, processed, and reproduced as single-line items, as lists of items, or in desired combinations with other items.

03.03 04 01 09 Fiscal Management

Services concerned with the financial and business operations of an agency.

03.03 04 01 10 Personnel Management

Services relating to the administration of the personnel management program of the school system. This consists of such activities as recruiting staff members, staff accounting, staff placement, staff transfer, and implementation of promotion policies.

03.03 04 01 11 Legal and Legislative

Services concerned with legal counsel and legislative recommendations and interpretation.

03.03 04 01 99 Other Specialized Aspects of Organization, Administration, and Operation of Intermediate and Local Education Agencies

Any other consultative and advisory services in any other specialized aspects of organization, administration, and operation of intermediate and local education agencies which are not listed and defined above.

03.03 04 02 00 *Developing Intermediate and Local Agency Administrative and Technical Staff Competencies*

Services for encouragement and guidance to districtwide administrative and technical staff in development of their competencies.

03.03 04 02 01 Preservice Orientation and Training

Services designed to aid in recruitment and training of new districtwide administrative and technical personnel.

03.03 04 02 02 Professional Leave

Services to advise and assist in drawing up and implementing leave programs which will enhance the competencies of local and intermediate district administrative and technical personnel.

03.03 04 02 03 Fellowships, Traineeships, and Internships

Services concerned with provision of fellowships, traineeships, and internships through colleges, universities, or other agencies and institutions, for the improvement of local agency administrative and technical staff.

03.03 04 02 04 Institutes, Workshops, Conferences, and Special Courses

Services concerned with advising and assisting in drawing up and implementing programs which will enhance the competencies of local and intermediate district administrative and technical staff.

03.03 04 02 05 Motivational Training

Services concerned with advising and assisting in developing activities and surroundings which will motivate staff and students to attain their optimum potential.

03.03 04 02 99 Other Developing Intermediate and Local Agency Administrative and Technical Staff Competencies

Any other administrative or technical staff developmental consultative services carried out by the State education agency and not listed and defined above.

03.03 04 99 00 *Other Administrative Consultative Services*

Any other administrative consultative services provided by the State education agency not listed and defined above.

03.03 99 00 00 **Other Consultative Services**

Any consultative and advisory services to local and intermediate education agencies not listed and defined above.

03.04 00 00 00 DISTRIBUTION OF RESOURCES

This major function includes all those *activities* which involve the allocation and distribution of resources to local and intermediate education agencies and any other agencies or institutions as provided by law. "Resources," in this context, is interpreted to include financial resources, material resources, and services. Important activities under this category are the allocation and distribution of State foundation program grants and Federal grants for special purposes.

It should be recognized, however, that a State education agency makes many expenditures or authorizations which are "flow-through" in nature and are *not* a part of the operational costs of the agency. It is necessary that a distinction be made between State operational expenditures and "flow-through" monies in order to avoid distorting the

actual operating costs of carrying out the functions of the agency. For instance, funds distributed annually by the agency under a State's foundation or equalization program are "flow-through" monies and are not included under this function. Rather, they should be accounted for in such a way as to be completely separate from the operating costs of "distributing financial resources."

Thus, to account for the various "flow-through" types of transactions, the function category would not be applicable. The appropriate identifying dimension would be an object category, "Grants and Subsidies," as provided in chapter 3.

State education agencies should devise their own methods for evaluating programs which are funded by these "flow-through" funds and for holding local education agencies accountable for expenditures, just as the State education agency is accountable to the source of those funds.

03.04 01 00 00 **Management of Distribution of Resources**

Activities concerned with the administration of the specific function of distribution of resources.

03.04 02 00 00 **Financial**

Activities involved in the allocation and distribution of any type of financial grants or subsidies.

03.04 02 01 00 *State*

Activities involved in the allocation and distribution of any type of State grants or subsidies.

03.04 02 02 00 *Federal*

Activities involved in the allocation and distribution of any type of Federal grants or subsidies.

03.04 02 99 00 *Other Financial*

Activities involved in the allocation and distribution of any financial resources other than those listed and defined above.

03.04 03 00 00 **Material**

Activities involved in the allocation and distribution of all kinds of material resources, including both materials and equipment.

03.04 03 01 00 *Textbooks*

Activities involved in the allocation and distribution of textbooks to the several school districts or schools of the State.

03.04 03 02 00 *Equipment*

Activities involved in the allocation and distribution of any kind of equipment. (Equipment distributed under the surplus property program should be coded as 03.04 03 04 00, *Surplus Property.)*

03.04 03 03 00 *Surplus Commodities*

Activities involved in the allocation and distribution of surplus commodities.

03.04 03 04 00 *Surplus Property*

Activities involved in the allocation and distribution of surplus property.

03.04 03 05 00 *Instructional Material*

Activities involved in the allocation and distribution of instructional materials.

3.04 03 99 00 *Other Material*

Activities involved in the allocation and distribution of any other material resources not listed and defined above.

03.04 04 00 00 **Services**

Activities involved in the allocation and provision of services to the several school districts or schools of the State.

03.04 04 01 00 *Planning*

Activities concerned with the provision of planning services to the several school districts or schools of

the State. See item number 03.02 02 00 00, page 89, for definition of *Planning.*

03.04 04 02 00 *Evaluation*

Activities concerned with the provision of evaluation services to the several school districts or schools of the State. See item number 03.02 05 00 00 page 91, for definition of *Evaluation.*

03.04 04 03 00 *Machine Data Processing*

Activities through which the State department provides to the local districts, through the use of machines and devices, services in the storing of individual items of information in a form by which they may be rapidly and accurately retrieved, processed, and reproduced as single-line items, as lists of items, or in desired combinations with other items. Included in this activity are such services as scheduling of courses, financial accounting systems, and pupil accounting systems.

03.04 04 04 00 *Management Information System*

Activities concerned with providing management information services to local school districts and schools. See item number 03.03 04 01 07, page 97, for definition of Management Information System.

03.04 04 04 01 Data Systems

Activities concerned with the establishment and maintenance of a system whereby a comprehensive collection of data, usually in machine useable form, can be used for purposes such as management, reporting, and research. Typically, an educational data system is comprised of component files relating to specific areas of information such as pupils, staff, property, finance, and instructional programs.

03.04 04 04 02 Statistical Services

Activities concerned with the provision of service to local districts in collecting and organizing educational data pertinent to the various educational interests. These data would be related to areas of information such as pupils, staff, instruction, facilities, and finance.

03.04 04 04 99 Other Management Information System

Activities concerned with other management information services not listed and defined above.

03.04 04 05 00 *Research*

Activities concerned with the provision of research services to the local schools or school districts. See item number 03.02 03 00 00, page 90, for definition of *Research.*

03.04 04 99 00 *Other Services*

Activities involved in the allocation and provision of any other services not listed and defined above.

03.04 99 00 00 **Other Distribution of Resources**

Activities involved in the distribution of resources of any kind not listed and defined above.

03.05 00 00 00 INTERNAL SERVICES

This major function is concerned with services provided to general management and to the operational units and personnel within the State education agency. They are supporting services, departmentwide in scope, which frequently represent cost centers for the accumulation of indirect costs.

03.05 01 00 00 **Management of Internal Services**

Activities concerned with the administration of the specific function of internal services.

03.05 02 00 00 **Fiscal Management**

Activities concerned with the financial and business operations of the State education agency.

03.05 02 01 00 *Accounting*

Services concerned with the financial accounting for the operation of the State education agency. Financial accounting is the recording and reporting of activities and events affecting the money of an administrative unit and its program.

03.05 02 02 00 *Audit*

Activities concerned with an examination of departmental documents, records, and accounts for the purpose of (1) determining the propriety of transactions, (2) ascertaining whether all transactions have been properly recorded, and (3) determining whether statements drawn from accounts reflect an accurate picture of financial operations and financial status.

03.05 02 03 00 *Budget*

Activities concerned with the preparation and control of the budget for the operation of the State education agency. The budget is a plan of operation embodying an estimate of proposed expenditures for a given period or purpose and the proposed means of financing them.

03.05 02 04 00 *Mail Control*

Services concerned with the prompt and proper distribution of incoming mail to the various units and personnel within the agency and the prompt and proper dispatch of all outgoing mail. This activity also often entails the responsibility for wrapping or packaging for mailing or shipment.

03.05 02 05 00 *Payroll*

Activities which involve the establishment and maintenance of adequate records for the payroll pertaining to all full-time and part-time employees of the State education agency.

03.05 02 06 00 *Purchasing*

Activities concerned with the agencywide purchasing of supplies, equipment, and services for the several organizational units of the agency. This includes establishment of proper and adequate control to check receipt of goods ordered against the purchase orders and the necessary and proper coordination with the financial accounting unit.

03.05 02 07 00 *Supply*

Services related to the allocation and distribution of supplies and equipment to the various organizational units and personnel of the agency. This usually includes responsibility for maintenance of inventory and storage facilities.

03.05 02 99 00 *Other Fiscal Management*

Any other fiscal management services not listed and defined above.

03.05 03 00 00 **Personnel Management**

Activities which carry out the administration of the staff personnel management program of the agency. It consists of assignments to perform such activities as recruiting staff members, staff accounting, staff placement, and staff transfer.

03.05 04 00 00 **Property Management**

Activities related to the acquisition, distribution, and maintenance of property within the agency. It includes inventory control and the establishment and maintenance of a property accounting system.

03.05 05 00 00 **Legal**

Activities concerned with legal counsel and services to define the relationship between the State education agency and other State departments, and the interpretation of legislation and rulings affecting education.

03.05 06 00 00 **Legislative**

Activities concerned with such matters as the interpretation and preparation of proposed legislation, maintenance of liaison with the State legislature, and provision of pertinent information to the State legislature.

03.05 07 00 00 **Library—Professionaal**

Activities associated with establishing and maintaining a professional collection of media pertinent to the needs of the professional staff of the agency. This includes activities such as selecting, ordering, cataloging, processing, and effecting utilization of all media throughout the agency.

03.05 08 00 00 **Management Information System**

A method for providing information regarding the agency's participation in educational efforts within

the State, a method for determining the amounts of effort invested by a State education agency in each of the things done by the agency itself, and a method for providing comprehensive information upon which logical management decisions can be based.

03.05 08 01 00 *Data Systems*

Services which provide for an orderly arrangement of data and procedures which will produce any desired interrelationship or summation which may be pertinent to reporting or decisionmaking.

03.05 08 02 00 *Statistical Services*

Services provided to the staff of the agency in collecting and organizing educational data pertinent to various educational interests, including pupils, staff, instruction, facilities, and finance.

03.05 08 99 00 *Other Management Information System*

Any other systems or services, in addition to those listed and defined above, which will contribute to the total management information system.

03.05 09 00 00 **Machine Data Processing**

Agencywide services whereby machines and devices are used in the storing of individual items of information in a form by which they may be rapidly and accurately retrieved, processed, and reproduced as single-line items, as lists of items, or in desired combinations with other items.

03.05 10 00 00 **Graphic Arts**

Agencywide services concerned with preparation of pictures, drawings, graphs, or other graphic presentations for illustrative matter in publications or to complement and aid oral presentations.

03.05 11 00 00 **Publications**

Services which provide a centralized printing or publication service for preparation of administrative and educational material, including typesetting, phototowork, duplication, copying, collating, punching, and binding.

03.05 12 00 00 **Editorial Services**

Agencywide services in the final preparation of documents for publication. This includes final checking of such matters as format, spelling, and sentence structure.

03.05 13 00 00 **Information Services**

Agencywide services related to the writing, editing, and other preparation necessary to disseminate educational and administrative information to the educational community and to the general public through direct mailing, the various news media, or personal contact.

03.05 14 00 00 **Records Management**

Services concerned with the establishment and maintenance of a system for management of agency records, including filing, control, and ultimate disposal.

03.05 99 00 00 **Other Internal Services**

Any agencywide internal supporting services not listed and defined above.

03.06 00 00 00 OPERATION OR APPROVAL OF PROGRAMS AND SCHOOLS

This major function covers a broad spectrum of important activities which are ancillary to the other major functions but of which no one stands alone as a *major* function. It provides for flexibility in that some of these activities may be carried out on a temporary basis only, and there may be few, if any, State education agencies to which *all* of these activities apply.

03.06 01 00 00 **Management of Operation or Approval of Programs and Schools**

Activities concerned with the administration of the specific function of operating and approving programs and schools.

03.06 02 00 00 **State Education Agency Programs**

Activities concerned with special programs or projects operated by the State education agency, as

authorized by State law or regulation, to supplement and help improve its services.

03.06 02 01 00 *Teacher Education Improvement*

Activities designed to improve the programs of professional development of teachers, both beginning teachers and those in service, through improved services on higher education campuses and in the local areas.

03.06 02 01 01 Institutional

Activities and responsibilities related to the improvement of teacher preparation programs in State teacher education institutions, normal schools, colleges, and universities.

03.06 02 01 02 Student Teaching

Activities and responsibilities intended to improve and upgrade student teaching experiences and programs.

03.06 02 01 99 Other Teacher Education Improvement

Any other programs, not listed and defined above, designed to improve the professional development of teachers.

03.06 02 02 00 *Public School Approval, Accreditation, Licensing, and Chartering*

Activities of the State education agency concerned with standards for regulating the approval, establishment, and operation of schools within the State. This includes activities such as: the application and enforcement of standards prescribed by law or regulation, the development and application of rules and regulations as mandated by law, and the establishment of accreditation that may exceed basic approval.

03.06 02 02 01 Approval

The act of sanctioning or recognizing a school or a program as having met prescribed standards. In some States, approval is used synonymously with accreditation. In other States, approval may imply the meeting of basic standards. The term "approval" usually applies to schools at the elementary and secondary levels or to a school system as an entity.

03.06 02 02 02 Accreditation

The act of sanctioning or recognizing a school as having met prescribed standards which may include student achievement. Accreditation may be based upon an educational audit whereby the State education agency or an independent party determines and reports the extent to which the students achieve in relation to a school's educational objective. In some States, accreditation is used synonymously with approval. Accreditation may imply the meeting of more rigid standards than approval and the accreditation may be done wholly or partially by an agency or organization other than the State education agency. In some States, the term "accreditation" applies only to secondary schools and institutions of higher education.

03.06 02 02 03 Licensing

The issuance of authorization to an individual, organization, or agency to operate a school for a specific period of time. Licenses are usually renewable, depending upon the results of periodic evaluation by the licensing agency.

03.06 02 02 04 Chartering

Activities concerned with the establishment of criteria for school charters and the issuance of such charters. A school charter is a written instrument, executed and issued by a governmental agency, which provides authority for the establishment of a school.

03.06 02 02 99 Other Public School Approval, Accreditation, Licensing, and Chartering

Other activities concerned with public school approval, accreditation, licensing, and chartering not listed and defined above.

03.06 02 03 00 *Nonpublic School Approval, Accreditation, Licensing, and Chartering*

See definition and explanation under item number 03.06 02 02 00, page 103.

03.06 02 03 01 Approval

See definition for item number 03.06 02 02 01, page 103.

03.06 02 03 02 Accreditation

See definition for item number 03.06 02 02 02, page 103.

03.06 02 03 03 Licensing

See definition for item number 03.06 02 02 03, page 103.

03.06 02 03 04 Chartering

See definition for item number 03.06 02 02 04, page 103.

03.06 02 03 99 Other Nonpublic School Approval, Accreditation, Licensing, and Chartering

Other activities concerned with nonpublic school approval, accreditation, licensing, and chartering not listed and defined above.

03.06 02 04 00 *Public School Personnel Certification and Licensing*

Activities concerned with the regulation of the work force of public schools within the State. This includes activities such as teacher certification and licensing of school bus drivers and school food service workers.

03.06 02 04 01 Professional

For the purposes of this handbook, professional personnel are those who have had extensive training in a particular line of work (usually a minimum of a bachelor's degree) and who perform activities regarded as professional by the laws and regulations established by the State or by other professional requirements recognized by the State. Examples are superintendents, teachers, architects, lawyers, and nurses.

03.06 02 04 02 Paraprofessional

A staff member who works alongside a professional staff member and assists him but who does not have full professional status; e.g., teacher's aide.

03.06 02 04 03 Nonprofessional

For the purposes of this handbook, nonprofessional personnel are any persons not included as professional or paraprofessional under the definitions above. Examples are clerical staff, school food service staff, school bus drivers, and custodians.

03.06 02 04 99 Other Public School Personnel Certification and Licensing

Activities concerned with public school personnel certification and licensing not listed and defined above.

03.06 02 05 00 *Nonpublic School Personnel Certification and Licensing*

Activities concerned with regulation of the work force of nonpublic schools within the State. This includes activities such as teacher certification and licensing of school bus drivers and school food service workers.

03.06 02 05 01 Professional

For definition see item number 03.06 02 04 01, page 104.

03.06 02 05 02 Paraprofessional

For definition see item number 03.06 02 04 02, page 104.

03.06 02 05 03 Nonprofessional

For definition see item number 03.06 02 04 03, page 104.

03.06 02 05 99 Other Nonpublic School Personnel Certification and Licensing

Activities concerned with nonpublic school personnel certification and licensing not listed and defined above.

03.06 02 06 00 *Nonschool Personnel Certification and Licensing*

Activities concerned with certification and licensing of personnel employed in other than educational occupations.

03.06 02 06 01 Professional

For definition see item number 03.06 02 04 01, page 104. Examples of nonschool professional personnel are lawyers, doctors, nurses, engineers, and psychologists.

03.06 02 06 02 Paraprofessional

For definition see item number 03.06 02 04 02, page 104.

03.06 02 06 03 Nonprofessional

For definition see item number 03.06 02 04 03, page 104. Examples of nonschool nonprofessional personnel are barbers, beauty operators, and practical nurses.

03.06 02 06 99 Other Nonschool Personnel Certification and Licensing

Activities concerned with nonschool personnel certification and licensing not listed and defined above.

03.06 02 07 00 *Direct Assistance to Individual Staff Members of Local Education Agencies and Schools*

Activities, aside from teacher education, which are designed to improve the competency of individual staff members.

03.06 02 07 01 Preservice Orientation and Training

Activities of the State education agency designed to give direct assistance to local agency personnel and schools in recruitment and training of new personnel prior to actual assignment.

03.06 02 07 02 Professional Leave

Activities of the State education agency designed to promote and assist in the granting of leave for staff members of local education agencies for the purpose of their professional improvement. In this case, the State education agency would aid directly with the cost of such leave.

03.06 02 07 03 Fellowships

Activities and responsibilities of the State education agency designed to assist in providing fellowships to the staff of local education agencies.

03.06 02 07 04 Traineeships

Activities and responsibilities of the State education agency designed to assist in providing traineeships to the staff of local education agencies.

03.06 02 07 05 Internships

Activities and responsibilities of the State education agency designed to assist in providing internships to the staff of local education agencies.

03.06 02 07 99 Other Direct Assistance to Individual Staff Members of Local Education Agencies and Schools

Other activities of the State education agency, not listed and defined above, which provide direct assistance to individual staff members of local education agencies and schools.

03.06 02 08 00 *Pupil Scholarship and Assistance Programs*

Activities and responsibilities of the State education agency in aiding qualified pupils to further their educational futures.

03.06 02 08 01 Scholarships

Activities and responsibilities of the State education agency in providing aid, both financial and otherwise, through scholarships, to qualified pupils for the purpose of encouraging and enabling them to continue their education.

03.06 02 08 02 Honors

Activities and responsibilities of the State education agency in providing aid, both financial and otherwise

through honors programs, to qualified pupils for the purpose of encouraging and enabling them to continue their education.

03.06 02 08 03 Work Study

A school program designed to provide employment for students who could not continue in school without the financial support provided through a job. The employment may or may not be curriculum related. (*Cooperative Programs* provide work experience specifically related to the student's instructional program. The student's on-the-job training is an integral part of his total school curriculum.)

03.06 02 08 99 Other Pupil Scholarship and Assistance Programs

Other pupil scholarship and assistance programs provided by the State education agency not listed and defined above.

03.06 02 09 00 *Pupil Transportation*

Services (actually provided by the State education agency) concerned with transporting pupils to and from school, between schools, and to school-related activities, including acquisition, allocation, maintenance, and safe operation of equipment.

03.06 02 10 00 *Educational Media*

Any devices, content materials, methods, or experiences used for teaching and learning purposes. These include printed and nonprinted sensory materials.

03.06 02 10 01 School Library Services

Activities and responsibilities of the State education agency in providing and supporting the adequacy of educational media at the local school level. These include such activities as assistance in ordering or selecting, cataloging, processing, and circulating educational media.

03.06 02 10 02 Television in Education

Activities and responsibilities of the State education agency in operating educational television stations, producing educational television programs, and assisting in the provision of services, equipment, and materials designed to provide learning experiences through the use of television.

03.06 02 10 03 Radio in Education

Activities and responsibilities of the State education agency in operating educational radio stations, producing educational radio programs, and assisting in the provision of services, equipment, and materials designed to provide learning experiences through the use of radio.

03.06 02 10 99 Other Educational Media

Other educational media programs not listed and defined above.

03.06 02 11 00 *Cultural Programs*

Activities and responsibilities of the State education agency in the development and implementation of cultural functions, programs, and services that are intended to benefit all persons in the State.

03.06 02 11 01 Library

Activities and responsibilities of the State education agency in maintaining a State library or libraries to provide services to local areas and local schools and public libraries when needed and requested. This includes activities and responsibilities for assisting public libraries and providing library extension services through such activities as budgeting, planning the libraries, collections in relation to community needs, selection of other library materials, providing and helping to organize library collections by use of a standard system of classification and cataloging, furnishing reference and referral service, circulating materials to patrons, and informing the general community of library resources and services.

03.06 02 11 02 Art

Activities and responsibilities of the State education agency in the operation of programs and services designed to collect, house, and exhibit works of art and to promote art appreciation among the people of the State.

03.06 02 11 03 Music

Activities and responsibilities of the State education agency in the operation of programs and services designed to promote music appreciation and participation among the people of the State.

03.06 02 11 04 Museum

Activities and responsibilities of the State education agency related to the operation and services to the programs of museums which collect, preserve, and exhibit objects of interest in such fields as science, literature, history, and art.

03.06 02 11 05 Dramatic Arts

Activities and responsibilities of the State education agency in the operation of programs and services designed to promote participation in the dramatic arts.

03.06 02 11 99 Other Cultural Programs

Other cultural programs and services operated by the State education agency which are not listed and defined above.

03.06 02 12 00 *Vocational Rehabilitation*

Services associated with determining the extent of disability, and preparing disabled persons for remunerative employment through diagnosis, guidance, physical restoration, training, and placement.

03.06 02 13 00 *Civil Defense*

Services associated with Federal or State training programs designed to provide adequa e civil defense against loss of life or property due to war or natural causes.

03.06 02 14 00 *Budget Review and Audit*

Services provided by the State education agency in reviewing budgets and auditing the accounts of local school districts.

03.06 02 99 00 *Other State Education Agency Programs*

Other programs operated by the State education agency which are not listed and defined above.

03.06 03 00 00 **State Education Agency Operated Schools and Institutions**

Activities concerned with the operation of schools, either directly or by contract, at any level, by the State education agency.

03.06 03 01 00 *Elementary (Regular)*

Activities concerned with the operation of elementary schools by the State education agency. For purposes of this handbook, an elementary school is composed of any span of grades from kindergarten through grade eight and classified as "elementary" by State practice.

03.06 03 02 00 *Secondary (Regular)*

Activities concerned with the operation of a school at the secondary level by the State education agency. For purposes of this handbook, a secondary school comprises any span of grades beginning with the next grade following the elementary school and ending with or below grade twelve, including junior high school.

03.06 03 03 00 *School for the Deaf*

Activities concerned with the operation by the State education agency of a school for the deaf which serves the deaf and those persons with severe hearing problems.

03.06 03 04 00 *School for the Blind*

Activities concerned with the operation by the State education agency of a school for those persons who are blind or who suffer severe visual handicaps.

03.06 03 05 00 *School for the Mentally Retarded*

Activities concerned with the actual operation by the State education agency of a school for those persons who are mentally retarded. For the purposes of this handbook, "mentally retarded" pupils are those identified by professionally qualified personnel as being mentally retarded, according to degree of retardation. This includes those individuals whose level of mental development is such that they have been identified as unable, without special help, to

profit from the usual school program. Children in this category are classified educationally as *educable* mentally retarded, *trainable* mentally retarded, and *severely* mentally retarded.

03.06 03 06 00 *Hospital School*

Activities concerned with the operation by the State education agency of schools within a hospital for those pupils who, because of physical or mental illness, are unable to participate in the regular school program.

03.06 03 07 00 *Correctional School*

Activities concerned with the operation by the State education agency of schools for those pupils who, because of severe antisocial behavior, cannot be allowed to participate in the regular school program.

03.06 03 08 00 *Junior College*

Activities concerned with the operation of a postsecondary institution which offers the first two years of college instruction, frequently confers an associate degree, and does not confer a bachelor's degree. The term "junior college" is often used interchangeably with the term "community college." *See also* COMMUNITY COLLEGE.

3.06 03 09 00 *College*

Activities concerned with the operation of a college by the State education agency. For the purposes of this handbook, a college is defined as a postsecondary school which offers general or liberal arts education, usually leading to a first degree.

03.06 03 10 00 *University*

Activities concerned with the operation of a university by the State education agency. For the purposes of this handbook, a university is defined as a postsecondary institution which typically comprises one or more colleges and one or more graduate or professional schools. *See also* COLLEGE.

03.06 03 11 00 *Vocational and Technical*

Activities concerned with the operation by the State education agency of vocational and technical schools. For the purposes of this handbook, a vocational or technical school is one which is separately organized and administered for the primary purpose of offering education and training in one or more semiskilled, skilled, or technical occupations. It may be at the secondary or postsecondary level. Departments of schools which offer courses or programs such as agriculture, home economics, office occupations, and other vocational or technical areas are not considered as separately organized vocational or technical schools.

03.06 03 12 00 *Adult Education*

Activities concerned with a statewide adult education program. For the purposes of this handbook, adult education is defined as instruction and services designed to meet the unique needs of adults and youth beyond the age of compulsory school attendance, who have either completed or interrupted their formal education. This may be provided by a school system, college, or other agency or institution through activities and media such as formal classes, correspondence study, radio, television, lectures, concerts, demonstrations, and counseling.

03.06 03 99 00 *Other State Education Agency Operated Schools and Institutions*

Other activities concerned with State education agency operated schools and institutions which are not listed and defined above.

03.06 99 00 00 **Other Operation or Approval of Programs and Schools**

Other activities concerned with the operation or approval of programs and schools which are not listed and defined above.

03.99 00 00 00 OTHER FUNCTIONS OF STATE DEPARTMENTS OF EDUCATION

Other major functions of State departments of education which are not listed and defined above.

PERSONNEL OF STATE EDUCATION AUTHORITY AND STATE DEPARTMENT OF EDUCATION

04.00 00 00 00

This section defines the items of information which are identified and classified in chapter 2, *Classification of Items of Information About State Education Agencies.* The classification and numbers of items in this section are identical with those in chapter 2, 04. SERIES, *Personnel of State Education Authority and State Department of Education.*

04.01 00 00 00 PERSONAL IDENTIFICATION INFORMATION

Information items in this subsection of the handbook serve to identify the board of education member and the staff member of the State department of education.

04.01 01 00 00 **Legal Name**

The full legal name of the person who serves as a member of any board having the status of a State education authority or who is a staff member of the State department of education, including last name, first name, middle name(s), and any other appendages such as Jr., Sr., or II.

04.01 02 00 00 **Other Name**

Any other name, including the maiden name of a married female, by which a board member or staff member is known or has been known.

04.01 03 00 00 **Identification Number**

The numbers assigned for identification and record-keeping purposes. These include such numbers as payroll number, employee number, health plan number, and retirement number.

04.01 04 00 00 **Social Security Number**

The number assigned by the Social Security Administration.

04.01 06 00 00 **Sex**

04.01 06 01 00 *Male*

04.01 06 02 00 *Female*

04.01 07 00 00 **Date of Birth**

The month, day of the month, and year of birth.

04.01 08 00 00 **Place of Birth**

The local governmental unit (e.g., city, county, township) and State, outlying area of the U.S., or foreign country in which the board member or staff member was born.

04.01 09 00 00 **Evidence Verifying Date and Place of Birth**

The type of evidence by which the date and place of birth are verified, e.g., birth certificate, hospital certificate, baptismal certificate, or legally acceptable affidavit.

03.01 10 00 00 **Military Service Status**

The nature of previous and current service in the armed forces, including type of discharge or separation, dates of active service, veteran's privileges, and current military status, if any.

04.01 11 00 00 **Citizenship Status**

The nature of citizenship status within the United States.

04.01 11 01 00 *Citizen*

A citizen of the United States, whether by birth or naturalization.

04.01 11 01 01 Natural Born United States Citizen

04.01 11 01 02 Naturalized United States Citizen

04.01 11 02 00 *Noncitizen*

Not a citizen of the United States, whether admitted to the United States for permanent residence or admitted as a nonimmigrant visitor.

04.01 11 02 01 Noncitizen, Citizenship Papers Pending

04.01 11 02 02 Noncitizen, Other

04.01 11 03 00 *Nation of Citizenship if Other Than United States*

The nation of which the board member or staff member is a citizen if not the United States.

04.01 99 00 00 **Other Personal Identification Information**

Additional identifying information pertaining to board members or staff members.

04.02 00 00 00 ASSIGNMENT CLASSIFICATION

This item in the handbook provides for the classification of the activities of board members and the assigned activities of each staff member according to groupings of activities which are recognized as being much alike in their nature.

The classification is on the basis of the marked similarity of activities performed by the board member or by the staff member. Unless so stated, the classification is not necessarily based on the functional location of the assignment, the qualifications of the board member or staff member, or the title of the board member or staff member. It should be noted that every activity assignment contributes to the performance of one or more functions. For example, a typist would be classified under "Clerical Assignment" whether she types for the Chief State School Officer (General Management), or for the Payroll Supervisor (Internal Services), or both.

A record entry is made for each board member and for each staff member indicating the assignment classification in which the assigned activities of the board member or of the staff member are classified.

When a person has more than one assignment, record entries are made to indicate the activity assignment classification in which each assignment is classified. Full-time or less than full-time assignments should be indicated.

In any assignment, the activities which are incidental to the principal activities or which are performed in connection with them are considered part of the assignment. Under Assignment Classification, for example, the assignment to a board member is classified as State Education Authority Service, and the activities as chairman of a subcommittee and the performance of other incidental activities in connection with board membership are *not* recognized as separate assignments. A staff member who is both a board member and chief executive officer of the State department of education has two assignments.

04.02 01 00 00 **State Education Authority Assignment**

An assignment, whether by public election or appointment by a State public official according to State law, to perform as a member of a group or as an individual responsible for policy decisions related to constitutional and legislative provisions pertinent to education. The assignment includes, in most instances, the exercise of judgment in the formulation of educational goals, in the supervision of legal and policy execution, and in decisionmaking in matters pertinent to the conduct of educational activities.

04.02 02 00 00 **Presiding Officer of State Education Authority Assignment**

An assignment to a publicly elected or duly appointed person to perform the executive management activities of a State education authority. In many instances a title such as "chairman of the State board of education" would indicate assignment as presiding officer of State education authority

04.02 03 00 00 **Administrative Assistant to State Education Authority Assignment**

An assignment to perform professional or other activities assisting the State education authority in the execution of its responsibilities.

04.02 04 00 00 **Chief Executive Officer Assignment**

An assignment, whether by public election or appointment by a duly constituted public official or authority, to a staff member to perform the general management activities of all or part of a State agency.

Generally executes policies determined by State education authority. In most instances the title of the chief executive officer of the State school system is "Superintendent of Public Instruction," "Superintendent of Education," or "Commissioner of Education." The term "Chief State School Officer" is synonymous with "Chief Executive Officer."

04.02 05 00 00 **Deputy or Assistant Chief Executive Officer Assignment**

An assignment to perform professional activities in the place of the executive officer in executing and developing policy and program plans and performing other general management activities of the State agency.

04.02 06 00 00 **Administrative Assistant to Chief Executive Officer Assignment**

An assignment to perform professional or other activities assisting the chief executive officer or his deputy in the execution of their responsibilities.

04.02 07 00 00 **Management Assignment Other Than Chief Executive or Deputy Assignment**

An assignment to perform the activities of managing and directing an operational function of the State agency for which policy and program plans have been broadly established.

The management and direction assignments of such staff members as assistant, associate, or deputy superintendent for planning, consultative services, finance (distribution of resources), administrative services (internal services) are classified here.

04.02 08 00 00 **Assistant Management Assignment Other Than Deputy or Assistant**

An assignment to perform professional activities assisting in the management of an operational function of the State agency for which policy and program plans have been broadly established.

The assistant management and direction assignments of such staff members as chief, unit head, or director of planning, statistics, pupil personnel services, personnel, and certification are classified here.

04.02 09 00 00 **Planning Assignment**

See item number 03.02 02 00 00, page 89, for definition of "Planning."

04.02 10 00 00 **Research Assignment**

See item number 03.02 03 00 00, page 90, for definition of "Research."

04.02 11 00 00 **Development Assignment**

See item number 03.02 04 00 00, page 90, for definition of "Development."

04.02 12 00 00 **Evaluation Assignment**

See item number 03.02 05 00 00, page 91, for definition of "Evaluation."

04.02 13 00 00 **Management Information System Assignment**

See item number 03.05 08 00 00, page 101, for definition of "Management Information System."

04.02 14 00 00 **Systems Analysis Assignment**

An assignment to perform activities involving the evaluation of alternatives which are relevant to defined objectives, based on judgment, and, wherever possible, on quantitative methods; develops data processing procedures for application to electronic data processing equipment.

The systems analysis assignment of such staff members as systems specialist, systems analyst, systems coordinator, and associate computer systems analyst are classified here.

04.02 15 00 00 **Statistical Assignment**

An assignment to perform activities dealing with the collection, analysis, and presentation of masses of numerical data.

The statistical assignments of such staff members as statistician, statistical specialist, and statistical analyst are classified here.

04.02 16 00 00 **Machine Data Processing Assignment**

An assignment to collect and organize data, convert data to machine-usable form, and prepare financial, property, pupil, personnel, and statistical reports with machine data processing equipment.

The machine data processing assignments of such staff members as director of automatic data processing services, programer, tabulating equipment operator, computer operator, and chief of machine operations are classified here.

The assignments of clerical and other staff members assigned to perform centralized machine data processing services are also classified here.

04.02 17 00 00 **Communication Assignment**

An assignment of a technical or professional nature in any of the communication media such as television, radio, and newspapers.

04.02 18 00 00 **Consultant Assignment**

An assignment of a professional nature as an expert in a specialized field to offer guidance, supervision, and help in promoting and improving the educational program, including its management, and in determining and implementing policies.

The activities of such staff members as consultant in various subject areas State scholarship programs, speech correction, and inservice teacher education are classified here.

04.02 19 00 00 **Training Assignment**

An assignment to help others acquire skills and knowledge with a view to increasing their competence in the discharge of responsibilities before or after employment.

04.02 20 00 00 **Personnel Assignment**

An assignment to administer the personnel management program of the agency. This consists of such activities as recruiting staff members, staff accounting, staff placement, staff transfer, and implementation of promotion policies.

04.02 21 00 00 **Accounting Assignment**

An assignment which involves the recording, classifying, and summarizing of data in terms of money, pupils, personnel, and property and interpreting the results thereof.

The activities of such staff members as accountant, cost benefit analysis accountant, and project control accountant are classified here.

04.02 22 00 00 **Auditing Assignment**

An assignment to check the sources of information and the adequacy and accuracy of a set of accounting records. This involves the examination and verification of accounts and records.

The assignments of such staff members as auditor (designated program area), chief auditor, auditor of public accounts, supervising accounts examiner, audit review analyst, and field auditor are classified here.

04.02 23 00 00 **Bookkeeping Assignment**

An assignment to keep a systematic record of business transactions and to prepare financial statements.

The assignments of such staff members as bookkeepers are recorded here.

04.02 24 00 00 **Purchasing Assignment**

An assignment to perform activities in connection with acquiring property, supplies, materials, and services.

The purchasing assignments of such staff members as chief of procurement and supply, purchasing agent, and procurement officer are classified here.

04.02 25 00 00 **Stores Handling Assignment**

An assignment to receive, store, and dispense supplies, materials, and equipment.

The stores handling assignments of such members as stock handler, warehouseman, supply officer, toolkeeper, and supervisor of warehouse management are classified here.

04.02 26 00 00 **Mail Control Assignment**

An assignment to route mail, prepare outgoing materials for mailing, and maintain internal written communication systems.

The mail control assignments of such staff members as supervisor of mail control, mail sorter, and mail clerk are classified here.

04.02 27 00 00 **Records Management Assignment**

An assignment to establish and maintain an adequate and efficient system for management of the records of the agency. This includes the provision for filing systems and techniques (including microfilming), archival facilities, and ultimate disposal of records.

04.02 28 00 00 **Legal Assignment**

An assignment to a staff member *qualified to practice law* to serve as attorney for the State education authority, the State department of education, or other educational agency.

The assignments of such staff members as lawyer, attorney, general counsel, associate counsel, and director of legal services are classified here.

04.02 29 00 00 **Legislative Liaison Assignment**

An assignment to coordinate with the State legislature in the preparation of educational legislation, to provide information to legislative committees and members, and to testify before such committees. Many of these same activities would apply to coordination with Congress at the Federal level.

04.02 30 00 00 **Architectural and Engineering Assignment**

An assignment to design and prepare plans and specifications for the construction, remodeling, or repair of buildings and facilities, and to oversee construction to insure compliance with plans and specifications.

The architectural or engineering assignments of such staff members as consulting architect, draftsman, consultant for campus planning, engineer, architect for technical studies, architectural supervisor, and supervisor of school structural planning are classified here.

04.02 31 00 00 **Media Assignment**

An assignment to serve as a specialist in the organization and use of all teaching and learning resources, including hardware, content material, and services.

04.02 32 00 00 **Library Assignment**

An assignment to provide professional library science services such as selecting, ordering, cataloging, processing, and circulating all media; planning the use of the media center by board members, staff members, and others; participating in staff planning for the use of all media; and guiding board members, staff members, and others in the use of the media program in schools or community service activities.

04.02 33 00 00 **Historian Assignment**

An assignment to write, edit, collect, verify, classify, and organize historical documents and materials.

04.02 34 00 00 **Curator and Scientist Assignment**

An assignment to collect, classify, preserve, and exhibit objects of interest in such fields as science, literature, history, and art.

04.02 35 00 00 **Graphic Arts Assignment**

An assignment to plan and arrange art layouts, using sketches, pictures, or diagrams to illustrate educational programs or processes for publication, demonstration, and more effective communication.

The graphic arts assignments of such staff members as graphic artist, illustrator, staff artist, visual aid illustrator, staff photographer, and graphic arts program specialist are classified here.

04.02 36 00 00 **Editorial Assignment**

An assignment to select, write, and review materials for publications; to plan layout and supervise

editorial staff of publications devoted to activites of institutional organizations, professional groups, or fields of knowledge; to prepare news releases, special brochures, and similar materials.

The editorial assignments of such staff members as director of publications, editorial consultant, and editorial assistant are classified here.

04.02 37 00 00 **Publications Assignment**

An assignment to publish printed materials by one or more of several processes, including linotype, phototype, duplicating machine, and varitype, and to assemble and distribute printed materials.

The publications assignments of such staff members as director of publications, supervisor of printing shop, supervisor of duplicating and printing, publications writer, publications coordinator, publications distributor, and multilith operator are classified here.

04.02 38 00 00 **Information Services Assignment**

An assignment to answer inquiries and to provide information regarding agency activities and the location of departments, offices, and employees within the agency.

The information services assignments of such staff members as receptionist and director of public information are classified here.

04.02 39 00 00 **Public Relations Assignment**

An assignment to plan and conduct public relations programs designed to generate publicity through such media as magazines, newspapers, radio, and television; to participate in community and civic programs; and to edit material and direct preparation of agency publications.

The public relations assignment of such staff members as director of public relations, assistant superintendent for school-community relations, and publicity specialist are classified here.

04.02 40 00 00 **Accreditation Assignment**

An assignment to review and evaluate an organizational unit (e.g., a school system, a school, or a program of studies) to certify that the organizational unit complies with the *legal requirements or prescribed standards* for the operations of such units.

04.02 41 00 00 **Certification Assignment**

An assignment to review and evaluate the training and experience of applicants for professional employment credentials, in accord with policy or legal requirements established by appropriate State authority or by State constitutional or legislative provisions.

The certification assignments of such staff members as supervisor of certification, director of teacher certification and preparation, director of professional certification, certification specialist, staff specialist for certificated personnel, supervising certification analyst, and certification specialist are classified here.

04.02 42 00 00 **Licensing Assignment**

An assignment to review and evaluate the training and experience of applicants for noneducational employment licenses in accord with policy or legal requirements established by appropriate State authority or by State constitutional or legislative provisions.

04.02 43 00 00 **School Direction and Management Assignment**

An assignment to perform the professional activities of administering a school.

The school direction and management assignments of such staff members as superintendent of school for blind, elementary or secondary school principal, president of a college or university, director of a community college or technical institute, and administrative dean are classified here.

04.02 44 00 00 **Assistant School Direction and Management Assignment**

An assignment to assist the principal or superinten dent of a school in performing the activities of directing and managing a school.

The assistant school direction and management assignments of such staff members as assistant superintendent of school for blind, assistant principal,

vice, principal, and assistant dean are classifieed here.

04.02 45 00 00 **Teaching Assignment**

An assignment to instruct pupils or students. The assignment may be in course or noncourse instructional situations.

The teaching assignments of such staff members as classroom teacher, television teacher, professor, instructor, teacher-educator, and itinerant instructor are classified here.

04.02 46 00 00 **Clerical Assignment**

An assignment to such activities as preparing, transferring, systematizing, and preserving written communications and records, and operating such mechanical equipment as bookkeeping machines, key-punch machines, duplicating machines, and tabulating machines.

The clerical assignments of such staff members as clerk, stenographer, typist, secretary, and office machine operator are classified here.

04.02 47 00 00 **Crafts or Trades Assignment**

An assignment to a recognized craft or trade such as carpentry, masonry, plastering, painting, plumbing, steamfitting, sheetmetal work, glazing, and mechanical repairing.

The crafts or trades assignments of such staff members as carpenter, brick mason, plasterer, roofer, painter, plumber, steamfitter, sheetmetal worker, electrician, glazier, mechanic, and utility man are classified here.

04.02 48 00 00 **Vehicle Operation Assignment**

As assignment to drive a vehicle such as a bus, truck, or automobile used in the service of the State education authority or the State department of education.

The vehicle operation assignments of such staff members as bus driver, truck driver, and chauffeur are classified here.

04.02 49 00 00 **Custodian Assignment**

An assignment to perform housekeeping and security services consisting of such activities as cleaning; operating heating, ventilating, and air-conditioning systems; guarding and caring for property; and servicing building equipment.

The custodian assignments of such staff members as custodian, janitor, sweeper, maid, matron, attendant, guard, watchman, and serviceman are classified here.

04.02 50 00 00 **Labor Assignment**

An assignment to perform manual labor not classified in another assignment classification.

The assignments of such staff members as laborer, helper, and unskilled worker are classified here.

04.02 51 00 00 **Other Professional Assignment**

An assignment to perform activities of a professional nature *not* classifiable in 04.02 01 00 00 through 04.02 45 00 00. Assignments classified here should be of such a nature that professional training is normally required for their performance.

04.02 52 00 00 **Other Technical Assignment**

An assignment to perform activities of a technical nature *not* classificable in 04.02 46 00 00 through 04.02 50 00 00. Assignments classified here should be of such a nature that technical education or training is normally required for their performance.

04.02 99 00 00 **Other Assignment Classification**

An assignment to perform activities *not* classifiable in 04.02 01 00 00 through 04.02 52 00 00.

04.03 00 00 00 SCOPE OF ASSIGNMENT

This item provides for the classification of the assigned activities of a board member or a staff member according to the scope or range of the application of the assignment.

A record entry is made for each person indicating the scope of service of the board member or of each

assignment of the staff member. If a person has more than one service assignment or staff assignment in the State, separate record entries are made to indicate the scope of each service or assignment.

04.03 01 00 00 **Out-of-State**

The assignment consisting of activities which are primarily outside the State boundaries. This assignment would consist primarily of activities carried on in the coordination with agencies of other States or the Federal Government.

04.03 02 00 00 **Statewide**

The assignment consisting of activities which extend or apply to all of the schools in the State or to all of the schools in the State at such instructional levels as the activities may apply.

04.03 03 00 00 **Regional in-State**

The assignment consisting of activities which apply to a region of the State or to more than a single school or supporting services facility, but which are not statewide in their application.

04.03 04 00 00 **Local**

The assignment consisting of activities which apply to a specific locality or to a single school or supporting services facility in the State, but which are neither statewide nor regional in their application.

04.03 05 00 00 **Internal**

The assignment concerned with services provided to general management and to the operational units and personnel of the State education agency.

04.03 99 00 00 **Other Scope of Assignment**

The scope of service not classifiable under items 04.03 01 00 00 through 04.03 05 00 00 is classified here.

04.04 00 00 00 GROUP ASSIGNMENT CLASSIFICATION

This item provides for the classification of the service or assigned activities of each board member or staff member according to whether the activities constitute a State education authority assignment, a professional educational assignment, a professional assignment other than educational, a technical assignment, a clerical assignment, or other assignment. *The classification is made on the basis of the activities performed by the board member or staff member and not on the basis of the qualifications of the board member or staff member.*

A record entry is made for each person indicating the group assignment classification in which the service or assigned activities are classified.

When a person has more than one assignment, separate record entries are made to indicate the group assignment in which each assignment is classified.

04.04 01 00 00 **State Education Authority Assignment**

An assignment to an individual selected by vote or appointment according to State constitutional or legislative provisions to represent the people of the State in the conduct of all or part of the State system of education.

The assignments consisting of policymaking, general supervision, the execution of policy and legal provisions, and the execution of powers derived from State constitutional and legislative authority of such individuals as board member, regent, and commissioner are classified here.

04.04 02 00 00 **Professional Educational Assignment**

An assignment regarded as professional in the field of education by the laws and regulations governing certification in the State or by other professional educational requirements recognized by the State.

The assignments consisting of professional educational activities of such staff members as superintendent, dean, associate commissioner for instruction, assistant superintendent for administration and finance, teacher, and director of pupil personnel are classified here.

04.04 03 00 00 **Professional Assignment Other Than Educational**

An assignment which relates to a particular field of professional specialization other than education.

The assignments of such staff members as engineer, physician, attorney, architect, librarian, and statistician are classified here.

04.04 04 00 00 **Technical Assignment**

An assignment which relates to a particular field of technical specialization other than education.

The assignments of such staff members as programer, television program director, technical writer, media technician, media aide, and computer operator are classified here.

04.04 05 00 00 **Clerical Assignment**

An assignment to such activities as preparing, transferring, systematizing, and preserving written communications and records, and operating such mechanical equipment as bookkeeping machines, key-punch machines, duplicating machines, and tabulating machines.

The clerical assignments of such staff members as clerk, stenographer, typist, secretary, and office machine operator are classified here.

04.04 99 00 00 **Other Group Assignment Classification**

The assignments not classifiable in 04.04 01 00 00 through 04.04 05 00 00 are classified here.

04.05 00 00 00 FAMILY AND RESIDENCE INFORMATION

Information items in this section concern dependents, marital status, and residence of the board member or staff member and person or persons to be notified in case of emergency.

04.05 01 00 00 **Family Information**

Information items in this subsection pertain to the immediate family of the board member or staff member.

04.05 01 01 00 *Marital Status*

04.05 01 02 00 *Dependents*

The number of individuals dependent on the board member or staff member. (The name, date of birth, condition of dependency, and other information about each dependent may be included in subitems.)

04.05 01 99 00 *Other Family Information*

04.05 02 00 00 **Residence Information**

04.05 02 01 00 *Permanent Address*

04.05 02 02 00 *Second Address*

04.05 02 99 00 *Other Residence Information*

04.05 03 00 00 **Telephone Numbers**

Each telephone number, including prefix, area (exchange), and code through which the person may be reached.

04.05 03 01 00 *At Permanent Address*

04.05 03 02 00 *At Second Address*

04.05 03 03 00 *At Location of Assignment*

04.05 03 99 00 *Other Telephone Numbers*

04.05 04 00 00 **Person to be Notified in Emergency**

The name, address, and telephone number(s) of the person or persons to be notified of an emergency. Information concerning both family and the physician may be recorded here.

04.05 99 00 00 **Other Family and Residence Information**

Other family and residence information not listed and defined above.

04.06 00 00 00 HEALTH INFORMATION

Items of information in this section concern the health of the board member or staff member. They are recorded here only to the extent that laws and

regulations permit or require them for such purposes as assignment, workmen's compensation, and disability retirement compensation.

04.06 01 00 00 **Physical Health**

04.06 01 01 00 *Physical Examinations*

Information concerning physical examinations and health test information as required or permitted by law and regulations.

04.06 01 01 01 Date of Recent Physical Examination

The month, day, and year indicated by a physician when the most recent physical examination or health test was completed.

04.06 01 01 02 Name and Address of Physician Who Performed the Physical Examination or Health Test

04.06 01 01 03 Physical Examination or Health Test Results

Information resulting from the most recent physical examination or health test as disclosed by the physician and required or permitted by law or regulation for record purposes.

04.06 01 02 00 *Physical Disability or Limitation*

Information indicating verified physical disabilities or limitations which need to be recognized in assignments.

04.06 01 03 00 *Immunization*

Information provided by a qualified person describing the required immunizations.

04.06 01 04 00 *Personal Injury*

A record entry describing each injury during the performance of official duties; the date, time, and location of each accident; names of any witnesses; date of filing claims under insurance plans; and other information required by local and State regulations.

04.06 99 00 00 **Other Health Information**

Any pertinent health information which is not provided in other items.

04.07 00 00 00 PRIOR SERVICE OR EMPLOYMENT INFORMATION

04.07 01 00 00 **Prior School Service or Employment**

Items of information about the board member's school-connected service or about the staff member's school-connected employment prior to current service or employment.

04.07 01 01 00 *Dates of Each Prior School Service or Employment*

Inclusive dates of period of service or employment by each school system or agency prior to current service or employment.

04.07 01 02 00 *Service or Employer (Name and Location)*

The name and location of each school system served prior to current employment.

04.07 01 03 00 *Nature of Service or Employment Assignment*

For each period of prior school service the descriptive name of the assignments performed by the board member (e.g., board member, regent, chairman of educational commission) or the descriptive name of the assignments performed by the staff member (e.g., teaching, clerical, or custodian assignment). If the assignments of the staff member were professional education, such information as instructional level, teaching field, and function should be recorded if applicable.

04.07 01 04 00 *Total Number of Years of Prior School Service or Employment*

A cumulative total expressed in years (e.g., 3 years, 2.5 years) of prior school-connected service.

04.07 01 04 01 Prior Public School Service or Employment

The number of years (e.g., 3 years, 2.5 years) of prior public school service or employment.

04.07 01 04 02 Prior Nonpublic School Service or Employment

The number of years (e.g., 3 years, 2.5 years) of prior nonpublic school service or employment.

04.07 02 00 00 **Prior Nonschool Service or Employment**

Items of information about nonschool service or nonschool employment prior to beginning board service or entering into employment with the State education agency.

04.07 02 01 00 *Dates of Each Prior Nonschool Service or Employment*

Inclusive dates of each nonschool service or employment period prior to current service or employment.

04.07 02 02 00 *Service or Employer (Name and Location)*

For each period of prior nonschool service or nonschool employment, the name of service or employer (e.g., board or organization, company, firm, or individual) and the address of the board or organization serviced or of the employer.

04.07 02 03 00 *Nature of Service or Assignment (Job Title)*

For each prior nonschool service a descriptive name of the kind of service (e.g., member of board of nursing, chairman of community welfare campaign, legislator) or for each nonschool employment, a descriptive name for the work to which assigned (e.g., salesman, mechanic, or secretary).

04.07 02 04 00 *Total Number of Years of Prior Nonschool Service or Employment*

A cumulative total expressed in years (e.g., 3 years, 6.5 years) of prior nonschool service or nonschool employment.

04.07 99 00 00 **Other Prior Service or Employment Information**

04.08 00 00 00 CURRENT SERVICE OR EMPLOYMENT INFORMATION

This section includes items of information concerning the current service of the board member or the current employment of the staff member. In case of a change in assignments, appropriate adjustments should be made in the records.

04.08 01 00 00 **Date Began**

The month, day, and year when the board member began service or when the staff member entered into employment.

04.08 02 00 00 **Time Status**

Items of information concerning the service-time status of the board member or the employment-time status of the staff member.

04.08 02 01 00 *Full-Time*

Service of a board member requiring that he serve during the entire term for which elected or appointed; total assignments of a staff member requiring his services during the whole of the normal work day, month, and year.

04.08 02 02 00 *Part-Time*

Service of a board member requiring that he serve only on call or within specific limitations (e.g., member of board of examination, *ad hoc* advisory board); total current assignments of a staff member requiring less than full-time services.

04.08 02 99 00 *Other Time Status*

Time status which can not be classified as either full-time or part-time because of such circumstances as extended leave or voluntary suspension of activity.

04.08 03 00 00 **Service or Employment Status**

The circumstances under which the board member or staff member serves.

04.08 03 01 00 *Temporary*

Status of a board member who is an interim appointment or whose appointment awaits confirmation; status of a staff member whose employment, by mutual understanding, is not to be of a permanent nature.

04.08 03 02 00 *Probationary*

Status of a staff member who is employed from year to year (subject to termination of employment by the governing authority) preliminary to being placed on tenure status.

04.08 03 03 00 *Permanent or Tenure*

The service status of a board member or the employment status of a staff member whose assignment is not subject to termination by the governing authority except under stipulated circumstances.

04.08 03 99 00 *Other Service or Employment Status*

The service status of the board member or employment status of the staff member who is not on temporary, tenure, or probationary status. Examples of board members having this status are those whose election or appointment is being contested, or who are under investigation. Examples of staff members having this status are those who are on year-to-year contracts with no tenure arrangements and long-term substitute teachers or other substitutes in professional positions who serve in a regular capacity but whose service does not qualify them for tenure.

04.08 04 00 00 **Contractual Status**

The type of contract under which the staff member is serving the State agency.

04.08 04 01 00 *Annual Contract*

A contract covering a period of 1 work year.

04.08 04 02 00 *Two-Year Contract*

A contract covering a period of 2 consecutive years.

04.08 04 03 00 *Three-Year Contract*

A contract covering a period of 3 consecutive years.

04.08 04 04 00 *Continuing Contract*

A contract which continues automatically from year to year without action on the part of the governing authority, but which may be terminated through appropriate action by the parties involved.

04.08 04 05 00 *None*

04.08 04 99 00 *Other Contractual Status*

A contract or agreement other than those listed and defined above.

04.08 05 00 00 **Contract Dates**

Significant dates (month, day, and year) of the contract between the staff member and the governing authority, including the dates when staff services are to begin and end, date the contract was made valid, and the date the contract was terminated for any reason.

04.08 06 00 00 **Period of Time Annually Employed**

The number of calendar months *annually* for which the staff member is employed by the State education agency. Months should be reported to the nearest half.

For staff members employed for short periods of time, such as in adult education programs or in training programs, number of weeks may be a more practical record entry.

04.08 07 00 00 **Assignment Location in Agency**

The name and number of the agency, office, or supporting service facility considered to be the assignment location of the staff member. For those who do not have a specific assignment location, the headquarters of the State education agency would be the record entry.

04.08 08 00 00 **Number of Years Served or Employed**

The number of complete years, excluding the current year, that the board member has served or that the staff member has been employed on a full-time or part-time basis.

04.08 09 00 00 **Number of Years in Current Assignment**

The number of complete years, excluding the current year, that the staff member has served in present assignment.

04.08 10 00 00 **Current Annual Salary or Wage**

Information concerning the annual contractual salary or wage to be paid to the staff member for the period of time employed during the current year.

04.08 10 01 00 *Annual Contract Salary or Wage*

The annual contractual salary or wage, before deductions, to be paid to the staff member during the current year.

04.08 10 02 00 *Wage Rate*

The rate of pay (e.g., hourly or daily) to be paid a staff member during the current year.

The wage rate is to be recorded under this item for those staff members whose annual salary or wage varies to the extent that a record entry under 04.08 10 01 00, *Annual Contract Salary or Wage,* would not be practical.

04.08 10 99 00 *Other Current Annual Salary or Wage*

The amount of money before deductions (*not* included in item 04.08 10 01 00, *Annual Contract Salary or Wage)* to be paid to the staff member during the year for such services as extra duty or overtime.

04.08 11 00 00 **Remuneration Other Than Salary or Wage**

Information pertaining to payment other than wages or salary and not included in item 04.08 10 00 00, *Current Annual Salary or Wage.*

04.08 11 01 00 *Per Diem*

Payments (not considered salary or wages) made to a board member or staff member either as *reimbursement for expenses* or *as a compensation for services rendered* on a daily basis.

04.08 11 01 01 Reimbursement for Expenses

04.08 11 01 02 Reimbursement for Services Rendered

04.08 11 99 00 *Other Remuneration Other Than Salary or Wage*

Any payment to a board member or staff member not covered in the items listed and defined above. Examples are payments in kind such as housing, food, or clothing in lieu of salary or wage.

04.08 12 00 00 **Classification**

Information pertaining to the classification of the employee under the applicable State personnel system such as merit system or civil service.

04.08 99 00 00 **Other Current Service or Employment Information**

04.09 00 00 00 EDUCATIONAL BACKGROUND AND CREDENTIAL INFORMATION

This section contains information regarding quantity and type of formal education and information about specific credentials held by the board member or staff member.

04.09 01 00 00 **Highest Level of Education Completed**

The highest level of formal education completed by the board member or staff member, characterized by years of attendance, and degrees or certificates earned.

04.09 01 01 00 *Less Than College Level*

04.09 01 01 01 Less Than Secondary Level

04.09 01 01 02 Secondary Level Completed

04.09 01 01 03 One Year Postsecondary

04.09 02 02 04 Two Years Postsecondary

04.09 01 01 05 Registered Apprenticeship Program Completed

04.09 01 01 99 Other Less Than College Level

04.09 01 02 00 *College Work Completed*

If the person has completed the equivalent of one or more years of formal study at the college or university level, the highest level of formal education completed is indicated by one of the items below.

04.09 01 02 01 One Year of College

The person has completed 1 year of college (grade 13) but less than 2 years based on evaluation of earned credits by an accredited college or university.

04.09 01 02 02 Two Years of College

The person has completed 2 years of college (grade 14) but less than 3 years based on evaluation of earned credits by an accredited college or university.

04.09 01 02 03 Three Years of College

The person has completed 3 years of college (grade 15) but less than 4 years based on evaluation of earned credits by an accredited college or university.

04.09 01 02 04 Bachelor's Degree

The person has completed the equivalent of 4 years of college (grade 16) and has earned a bachelor's degree.

04.09 01 02 05 Bachelor's Degree Plus 15 Semester Hours

04.09 01 02 06 Master's Degree or Equivalent

The person has earned a master's degree or other equivalent degree.

04.09 01 02 07 Master's Degree or Equivalent Plus 30 Semester Hours

04.09 01 02 08 Other Second-Level Degree or Advance Certificate

The person has earned a degree (e.g., educational specialist degree), above the master's degree level but below the level of a doctor's degree.

04.09 01 02 09 Doctor's Degree

The person has earned a doctor's degree.

04.09 02 00 00 **Information About Schools or Other Educational Institutions Attended**

Informational characteristics which identify the schools or institutions attended.

04.09 02 01 00 *Names of the Schools or Other Educational Institutions Attended*

The name or other designation (e.g., school district number) of the elementary school and the secondary school last attended, and each college, university, technical institute, trade school, school of nursing, or other postsecondary school attended.

04.09 02 02 00 *Types of Schools or Other Educational Institutions Attended*

A descriptive entry (e.g., public school, nonpublic school, technical institute, school of nursing, trade school, college, or university) to indicate the type of each school attended.

04.09 02 03 00 *Location of Schools or Other Educational Institutions Attended*

The city and State in which each school or other educational institution attended is located. Where the location is other than in the United States, the nation should be indicated.

04.09 02 04 00 *Dates of Attendance at Schools or Other Educational Institutions*

Dates of attendance at each school or other educational institution and the duration of the attendance.

04.09 02 05 00 *Accreditation Status of Schools or Other Educational Institutions Attended*

The accreditation status of each postsecondary school attended, including national, professional, State and regional accreditation, and the accrediting agencies.

04.09 03 00 00 **Information About College Preparation**

04.09 03 01 00 *Major(s)*

The descriptive name of the major(s) completed during undergraduate and graduate study.

A major should be recognized in each State in terms of the applicable State laws and regulations governing certification.

04.09 03 02 00 *Number of Semester Hours of Credit Earned in Each Major*

The numb r of semester hours of credit earned in each recognized major. Quarter hours are converted to semester hours on the basis that 1 quarter hour is equal to two-thirds of a semester hour.

04.09 03 03 00 *Minor(s)*

The descriptive name of the minor(s) completed in undergraduate and graduate study. A minor should be recognized in each State in terms of the applicable State laws and regulations governing certification.

04.09 03 04 00 *Number of Semester Hours of Credit Earned in Each Minor*

The number of semester hours of credit earned in each minor. Quarter hours are converted to semester hours on the basis that 1 quarter hour is equal to two-thirds of a semester hour.

04.09 03 05 00 *Each Field or Area of Specific Preparation*

The descriptive name of each field or area of specific preparation (e.g., library science, specialized teaching field, general teaching field, counseling and guidance, and educational administration). The descriptive names should be those recognized and used for record purposes in the State, and should be consistent with the descriptive names of fields, courses, noncourse instruction, and nonteaching service recorded under CREDENTIAL INFORMATION.

04.09 03 06 00 *Number of Semester Hours of Credit Earned in Each Field or Area of Specific Preparation*

The number of semester hours earned in each of the recognized fields or areas of specific preparation.

04.09 03 07 00 *Number of Semester Hours of Professional Credit Earned*

The number of semester hours earned in recognized undergraduate and graduate professional education courses.

04.09 03 08 00 *Total Number of Semester Hours of Credit Earned*

The total number of semester hours of credit earned in undergraduate and graduate study.

04.09 04 00 00 **Credential Information**

Items of information concerning each active certificate, license, or other credential which has significance in terms of assignments.

04.09 04 01 00 *Name of Credential Held*

The complete name or title, including identification number, of each active credential held.

04.09 04 02 00 *Issuing Agency*

The name of the agency (e.g., State Department of Education or State Department of Health) which issued each active credential held.

04.09 04 03 00 *Date of Issuance*

The month, day, and year each active credential was issued.

04.09 04 04 00 *Date Credential Renewed or Reissued*

The month, day, and year of each renewal of each credential, either by reissuance or by endorsement by the issuing agency.

04.09 04 05 00 *Credential Expiration Date*

The month, day, and year when each active credential will expire.

04.09 04 06 00 *Area of Responsibility Authorized by Credential*

Each area of responsibility within which service is authorized by each active credential held.

04.09 04 07 00 *Instructional Levels Authorized by Credential*

The instructional level or levels within which service is authorized by each active credential held.

04.09 04 08 00 *Grade(s) Authorized by Credential*

The grade or range or grades within which service is authorized by each active credential held.

04.09 04 09 00 *Teaching Fields or Areas Authorized by Credential or Endorsement*

The descriptive name of each teaching field within which the board member or staff member is authorized to teach by each active credential held. Entries should be in accordance with local and State practice and terminology should be consistent with other items and terms pertaining to teaching fields. In a departmentalized organization, a teaching field is a major subdivision of the educational program, such as language arts, foreign languages, mathematics, science, music, vocational education, and physical education. In a nondepartmentalized situation or in a self-contained classroom, a general teaching level such as elementary or secondary may be the most accurate designation of teaching field.

04.09 04 10 00 *Course(s) or Subject(s) Authorized by Credential*

The descriptive name or title of each course or subject the person is authorized to teach by each active credential held.

The descriptive names or titles should be in accordance with local and State practice and terminology.

04.09 04 11 00 *Noncourse Instruction Authorized by Credential*

The descriptive name of each instructional service (not identified as course instruction and not classified in the areas of school library, audiovisual, guidance, or psychological services) which the person is authorized to perform by each active credential held. The descriptive name should be in accordance with local and State practice and terminology.

04.09 04 12 00 *Nonteaching Assignment*

The name of each activity other than teaching (e.g., librarian, supervision, and school direction and management) which the person is authorized to perform by each active credential held.

04.09 04 99 00 *Other Credential Information*

04.09 99 00 00 **Other Educational Background and Credential Information**

04.10 00 00 00 OTHER EDUCATION OR TRAINING, ORGANIZATIONAL MEMBERSHIPS, TRAVEL, AND AVOCATIONAL INFORMATION

This item includes those descriptors which will further contribute to a complete record of the educational and cultural background of the board member or staff member.

04.10 01 00 00 **Other Education or Training**

Any study or training such as inservice training completed which has significance to assignments. College preparation for which college credit is earned is not recorded here.

Inservice education or training, as defined in this handbook, is a program of systematized activities promoted or directed by the State education agency, or approved by the State education agency, contributing to the professional or occupational growth and competence of board members and staff members during the time of their service to the agency. College

credit programs are not regarded as inservice education or training.

04.10 02 00 00 **Organizational Memberships and Participation**

Information items concerning membership in professional, honorary, cultural, or civic organizations.

04.10 02 01 00 *Professional Organizations*

The names of the professional organizations to which the board member or staff member belongs, the positions of trust and leadership (including dates) held in the organization, and any pertinent information regarding the services performed in each organization.

04.10 02 02 00 *Honorary, Cultural, and Civic Organizations*

The names of the honorary, cultural, and civic organizations to which the person belongs. Descriptive names of leadership positions (including dates) also may be recorded.

04.10 03 00 00 **Travel**

The nature and dates of travel to other countries or other parts of the United States when such travel is significant as record information.

04.10 04 00 00 **Avocational Interests and Abilities**

A description of hobbies and other avocational interests and abilities that may enhance the individual's public service or performance. Singing, art, instrumental music, writing, public speaking, or youth work are examples of information that may be included in this category.

04.10 05 00 00 **Foreign Language**

Identification of foreign languages spoken.

04.10 99 00 00 **Other: Other Education or Training, Organizational Memberships, Travel, and Avocational Information**

04.11 00 00 00 TERMINATION OF SERVICE OR EMPLOYMENT, LEAVE, RETIREMENT, AND INSURANCE INFORMATION

04.11 01 00 00 **Termination Information**

04.11 01 01 00 *Voluntary Termination*

Information about the expiration of the service period of the board member or the separation of the staff member from employment with the State education agency. (School employment is considered to include employment in an institution of higher education.)

04.11 01 01 01 To Accept Public School Employment in the State

04.11 01 01 02 To Accept Nonpublic School Employment in the State

04.11 01 01 03 To Accept Public School Employment in Another State

04.22 01 01 04 To Accept Nonpublic School Employment in Another State

04.11 01 01 05 To Return to Formal Study

04.11 01 01 06 To Accept Other Than School Employment

04.11 01 01 07 To Enter Armed Forces

04.11 01 01 08 For Family Reasons

04.11 01 01 09 For Health Reasons

04.11 01 01 10 Voluntary Retirement

04.11 01 01 99 Other Voluntary Termination

04.11 01 02 00 *Involuntary Termination*

The circumstances under which the board member is separated from service or the staff member is separated from employment with the State through action not initiated by the board member or staff member.

04.11 01 02 01 Administrative Action

The separation of the board member from service or the separation of the staff member from employment with the State resulting from action initiated by the governing authority.

04.11 01 02 02 Certificate Revocation

The separation from employment with the State agency because of revoked certificate, independent of any other reason.

04.11 01 02 03 Certification Expiration

The separation from employment with the State agency because of an expired certificate.

04.11 01 02 04 Abolition of Job

The separation of the board member because of the dissolution of the board or the separation of the staff member because the job has been abolished for such reasons as lack of funds, lack of work, or program changes.

04.11 01 02 05 Compulsory Retirement

The separation from State service or employment because of mandatory requirements of a retirement system or because of policies pertaining to service.

04 11 01 02 06 Death

04.11 01 02 99 Other Involuntary Termination

04.11 01 03 00 *Date of Termination*

The month, day, and year of separation from service or employment with the State.

04.11 02 00 00 **Leave Information**

Information concerning any grant of legitimate absence from services or duty assignment. In the case of the staff member, such information as amount of leave accumulated and amount of allowed leave is recorded under the appropriate items.

04.11 02 01 00 *Sick Leave*

04.11 02 02 00 *Personal Leave*

04.11 02 03 00 *Annual Leave*

04.11 02 04 00 *Sabbatical Leave*

04.11 02 05 00 *Military Leave*

04.11 02 06 00 *Maternity Leave*

04.11 02 99 00 *Other Leave Information*

04.11 03 00 00 **Retirement System Information**

Information relating to membership in a retirement system for which the State has accounting responsibilities. Such information as the date (month, day, and year) when the person entered the retirement system, years of creditable service, earliest date of retirement, date of mandatory retirement, actual date of retirement, and condition of retirement may be record items.

04.11 04 00 00 **Insurance Information**

Significant information concerning membership in an insurance plan for which the State has accounting responsibilities.

04.11 99 00 00 **Other Termination of Service or Employment, Leave, Retirement, and Insurance Information**

04.12 00 00 00 PERFORMANCE INFORMATION

This section provides for the recording of information concerned with the evaluation of the employee's performance. Items of information to be recorded under this section will be determined by State law, regulations, and practice.

PROPERTY UTILIZED BY STATE EDUCATION AUTHORITY AND STATE DEPARTMENT OF EDUCATION

05.00 00 00 00

Property, as used in this handbook, is a descriptive heading under which is recorded specific information

about land, buildings, and equipment under the jurisdiction or control of a State education authority or a State department of education.

05.01 00 00 00 SITE IDENTIFICATION

This section includes the major characteristics by which a site may be identified such as location, use, ownership, area, and acquisition cost. Site is defined as a piece of land and all improvements to it except structures.

05.01 01 00 00 **Location of Site**

Street address or other appropriate designation.

05.01 02 00 00 **Use of Site**

The use of a site is shown by indicating the type of plant or building located on it or, if the site is vacant, the purpose for which it is used.

05.01 02 01 00 *State Department of Education Office Building*

A building used to house staff members of the State department of education and, usually, the members of the State education authority.

05.01 02 02 00 *Instruction Building*

A building used primarily for housing State education agency personnel and equipment engaged in instructional activities that are available to more than one school or school district. Examples of this kind of building are separate television and radio stations, gymnasiums, auditoriums, libraries, and demonstration centers.

05.01 02 03 00 *Transportation Building*

A building used primarily for housing personnel and equipment engaged in activities which have as their purpose the conveyance of pupils to and from school activities, either between home and school or on trips for curricular or cocurricular activities, or the conveyance of staff members. This includes building facilities such as those for transportation supervisors, mechanics, clerks, bus waiting station, and storage for vehicles and supplies used in the transportation program.

05.01 02 04 00 *Maintenance Building*

A building used primarily for housing personnel and equipment engaged in activities concerned with the repair and upkeep of grounds, buildings, and equipment or with the manufacture of equipment. This includes building facilities such as those for carpenters, cabinetmakers, machinists, mechanics, painters, plumbers, electricians, and groundskeepers.

5.01 02 05 00 *Warehouse*

A building used primarily to store supplies and equipment for the State education agency.

05.01 02 06 00 *Food Services Building*

A building used primarily for housing both personnel and equipment engaged in the preparation, serving, or distribution of meals for the benefit of State agency personnel.

05.01 02 07 00 *Public Library Building*

A community services building used primarily for the custody, circulation, and administration of a collection of books, manuscripts, and periodicals kept for the use of the general public, but not for sale.

05.01 02 08 00 *Museum Building*

A building used primarily for preserving and exhibiting artistic, historical, or scientific objects.

05.01 02 09 00 *State School Buiiding*

A building used to house any school, including supporting services, operated by the State education agency. *See also* STATE OPERATED SCHOOLS.

05.01 02 10 00 *Community Services Building*

A building used primarily for housing personnel and equipment engaged in activities carried on by the State education agency for the community as a whole or for some segment of the community. This term includes buildings used primarily for housing civic activities such as meetings of citizens, public forums and lectures, parent and teacher associations, and civil defense planning; for activities concerned with the

custodial and detention care of children, and for activities concerned with the provision of aid to indigent children.

05.01 02 11 00 *Parking*

Any site used for the parking of vehicles.

05.01 02 11 01 Employee

A parking site reserved for the use of employees of the State education agency.

05.01 02 11 02 Public

Any parking site which is open to the public.

05.01 02 11 99 Other Parking

05.01 02 99 00 *Other Use of Site*

Any other uses of a site not listed and defined above.

05.01 03 00 00 **Ownership of Site**

This section refers to the individual, agency, organization, or governmental unit holding title to the site.

05.01 03 01 00 *Public*

Site owned by any governmental agency.

05.02 03 01 01 State

Site owned by the State government or a State governmental agency other than a State building authority.

05.01 03 01 02 Municipal

Site owned by a municipal unit of government.

05.01 03 01 03 Authority

Site owned by a State building authority.

05.01 03 01 99 Other Public

Any other public ownership of site.

05.01 03 02 00 *Nonpublic*

Any site, other than publicly owned, that is used for State education agency purposes and that is under the jurisdiction of the State education agency.

05.01 03 02 01 Rented

Site owned by an individual or agency other than a governmental agency, which is rented, usually on a monthly basis.

05.01 03 02 02 Leased

Site owned by an individual or agency other than a governmental agency, which is leased, usually on an annual basis, for a fixed sum of money.

05.01 03 02 99 Other Nonpublic

Any other nonpublic ownership of site.

05.01 04 00 00 **Dates of Acquisition**

The dates on which the original site and additions thereto were acquired. For leased or rented property, the dates on which the lease or rent began.

05.01 04 01 00 *Original Site*

The date(s) on which the owning agency consummated the transfer of ownership of the land, or any part(s) thereof, comprising the original site at the time the facility was first accepted and put into use by the State agency.

05.01 04 02 00 *Each Addition to Original Site*

The dates on which the owning agency consummated the transfer of ownership of the land, or any part(s) thereof, comprising additions to the original site.

05.01 05 00 00 **Date of Disposal**

The date on which each piece of land in a site was sold or otherwise disposed of so that the agency no longer retains it for any purpose.

140

05.01 06 00 00 **Area of Site**

The total number of developed and undeveloped acres in a site to the nearest tenth, including areas occupied by buildings, walks, drives, parking facilities, and other improvements to a site.

05.01 07 00 00 **Cost of Site**

The cost of a site as maintained in the records of the owning governmental agency is the actual cost to that agency.

05.01 07 01 00 *Cost of Land*

The cost of land includes the purchase price paid by the owning agency for all land that makes up a site and all improvements to the land existing at the time of purchase, plus all costs related to acquiring title to the land, such as appraisal fees, search and title insurance, site surveys, and condemnation proceedings.

If the purchase price of the land also includes some buildings which are retained for use, the appraised value of the buildings should be deducted from the price of the land and a record established for the buildings. If the buildings are sold rather than retained for use, the salvage value should be deducted from the price of the land.

When the actual cost of the land is unknown, the figure to use is the estimated cost as of the time of acquisition.

Cost of land does not include improvements to site made after the land was acquired by the State agency: such costs are recorded under Cost of Improvements to Site.

05.01 07 02 00 *Cost of Improvements*

Cost of a site improvement includes the contract amount for contract work and salaries and other expenses for work done by the State education agency employees, plus any other expenses connected with any initial installation or extension of a site improvement. It also includes the cost of any special assessments against the State agency for capital improvement on or off the site, such as streets, curbs, and drains on or adjacent to the site, and any easements involved.

When the actual cost of an improvement to site is unknown and the cost of the land is known and has been recorded, the figure to use is the estimated cost as of the time the improvement was made.

05.01 07 99 00 *Other Cost of Site*

Other costs of a site or costs of site improvements.

05.01 99 00 00 **Other Site Identification**

Other major characteristics by which a site may be identified.

05.02 00 00 00 BUILDING IDENTIFICATION

Those characteristics of a given building which will tend to identify it in such terms as location, use, and ownership.

05.02 01 00 00 **Location of Building**

Street address or other appropriate designation.

05.02 02 00 00 **Use of Building**

A building may be used to house State education agencies, State operated schools, or supporting services; or it may be vacant.

05.02 02 01 00 *State Education Authority*

Housing for the State education authority.

05.02 02 02 00 *State Department of Education*

Housing for staff members of the State department of education.

05.02 02 03 00 *Instructional Services*

Housing for State education agency personnel and equipment engaged in instructional services that are available to more than one school or school district.

05.02 02 04 00 *Transportation Services*

Housing for transportation services provided at the State level.

05.02 02 05 00 *Maintenance Services*

Housing for personnel and equipment engaged in the maintenance of grounds, buildings, and equipment at the State level.

05.02 02 06 00 *Warehouse Services*

Storage of supplies and equipment for the State education agency.

05.02 02 07 00 *Food Services*

Housing for personnel and equipment engaged in the preparation and serving of meals for State education agency personnel.

05.02 02 08 00 *Public Library Services*

Housing for the custody and circulation of a collection of books, manuscripts, and periodicals kept for the use of the general public, but not for sale, and for library personnel.

05.02 02 09 00 *Museum Services*

Housing for personnel and equipment engaged in preserving and exhibiting artistic, historical, or scientific objects, and for the storage and exhibition of such objects.

05.02 02 10 00 *Community Services*

Housing for those activities which are carried on by the State education agency for the community as a whole or for some segment of the community.

05.02 02 11 00 *State School*

Housing for the pupils and staff of any school including supporting services, which is operated by the State education agency. *See also* STATE OPERATED SCHOOLS.

05.02 02 99 00 *Other Use of Building*

05.02 03 00 00 **Ownership of Building**

This section refers to the individual, agency, organization, or governmental unit holding title to the building.

05.02 03 01 00 *Public*

A building owned by any governmental agency.

05.02 03 01 01 State

A building owned by the State government or a State governmental agency other than a State building authority.

05.02 03 01 02 Municipal

A building owned by a municipal unit of government that is used for State education agency purposes.

05.02 03 01 03 Authority

A building owned by a State building authority that is used for State education agency purposes.

05.02 03 01 99 Other Public

Ownership by any governmental agency other than those listed and defined above.

05.02 03 02 00 *Nonpublic*

Any building, other than publicly owned, that is used by a State education agency and is under State education agency jurisdiction.

05.02 03 02 01 Rented

A building, owned by an individual or agency other than a governmental agency, which is rented, usually on a monthly basis.

05.02 03 02 02 Leased

A building, owned by an individual or agency other than a governmental agency, which is leased, usually on an annual basis, for a fixed sum of money.

05.02 03 02 99 Other Nonpublic

Any other nonpublic ownership of a building.

05.02 04 00 00 **Dates of Acquisition**

If dates of acquisition are unknown, they should be estimated. For leased or rented property, the dates are those on which the lease or rent begins.

05.02 04 01 00 *Original Building*

The earliest date on which the owning agency consummated the transfer of ownership of the existing building or any part thereof. For a building constructed by governmental agency employees, it is the date construction was completed as acceptable.

05.02 04 02 00 *Each Addition to Original Building*

Date of satisfactory completion of any addition to an original building.

05.02 05 00 00 **Design Life of Building**

The total number of years the building is estimated to serve from the time of construction.

05.02 06 00 00 **Anticipated Useful Life of Building**

The estimated number of years that a building will serve in a satisfactory manner in view of the conditions to which it is subjected.

05.02 07 00 00 **Date of Disposal**

The date on which a building was sold or otherwise disposed of so that the owning agency no longer retains it for any purpose.

05.02 08 00 00 **Type of Building Construction**

Characteristics of building components in relation to resistance to fire.

05.02 08 01 00 *Fire-Resistive*

A building constructed entirely of fire-resistive materials or a building with fire-resistive walls and partitions, floors, stairways, and ceiling. A building of this type may have wood finish, wood or composition floor surfaces, and wood roof construction over a fire-resistive ceiling.

05.02 08 02 00 *Semi-Fire-Resistive*

A building with fire-resistive exterior and bearing walls and fire-resistive corridor and stairway walls, floors, and ceiling, but with ordinary construction otherwise, such as combustible floors, partitions, roofs, and finish.

05.02 08 03 00 *Combustible*

An all-frame building; a building with fire-resistive veneer on wood frame; or one with fire-resistive bearing walls, but otherwise of combustible construction.

05.02 08 04 00 *Mixed Construction*

A building with one or more sections of one type of construction and one or more sections (as additions) of another type of construction.

05.02 09 00 00 **Availability of Building**

The extent to which a building is available for occupancy.

05.02 09 01 00 *Complete Occupancy*

The designation used for a building when the entire floor area of the building is available for State education agency use.

05.02 09 02 00 *Partial Occupancy*

The designation used for a building when only a part of the floor area of the building is available for State education agency use. When this designation is used, the other applicable accounts should be interpreted as applying only to the part of the building available for State education agency use.

05.02 09 03 00 *Abandoned*

The designation used for a building abandoned and officially classified as unsuitable for use by action of the governing authority because of such reasons as location or unsatisfactory physical condition.

05.02 10 00 00 **Mobility of Building**

Designation as to whether the building is permanently fixed or is movable.

05.02 10 01 00 *Permanent*

A building designed for a site and constructed on its site and not intended to be moved.

05.02 10 02 00 *Mobile*

A building designed and constructed so that it can be disassembled and transported to another location, or transported to another location without disassembling.

05.02 11 00 00 **Size of Building**

Area in square feet of total floor space of the building and the floor space of the various sections of the building.

05.02 11 01 00 *Gross Floor Area*

The gross area of a building is the sum of the areas at each floor level included within the principal outside faces of exterior walls, neglecting architectural setbacks or projections. Include all stories or areas which have floor surfaces with clear standing head room (6 feet 6 inches minimum) regardless of their use. Where a ground level or intermediate story, or part thereof, is left unenclosed, consider the gross area of the unenclosed story as the projected area of the story above. Exclude all unroofed areas and unenclosed roofed-over spaces. Include mezzanines, balconies, and library stack floors only to the extent of their actual floor area; do not include unenclosed areas under the first floor. Unenclosed roofed areas which have been included in original cost contracts can be excluded on a computed or estimated basis for the development of comparative data of gross building areas and costs.

The area of passageways enclosed with similar type and quality of construction as the building proper, and of tunnels with clear standing head room of at least 6 feet 6 inches, are included in the gross area of a building. The area of covered passageways which are *not* enclosed with similar type and quality of construction as the building proper are excluded from the gross building area.

05.02 11 01 01 Area of Basement

The area in square feet of any floor that is below grade level on all sides and has clear standing head room of at least 6 feet 6 inches. "Below grade level" means that, if the horizontal plane of the floor were to be extended on the side in question, all or part of the land within 20 feet of the building would be above this plane.

05.02 11 01 02 Area of First Floor

The area in square feet of the first floor, beginning at the bottom of the building, that is at or above grade level along at least one entire side and has clear standing head room of at least 6 feet 6 inches. "At or above grade level" means that, if the horizontal plane of the floor were to be extended on the side in question, no land within 20 feet of the building would be above this plane.

05.02 11 01 03 Area of Each Additional Floor

The area in square feet of each floor above the first floor with clear standing head room of at least 6 feet 6 inches.

05.02 12 00 00 **Cost of Building**

The cost of a building as maintained in the records of the owning governmental unit is the actual cost to that unit in acquiring the building, regardless of how the building may have been acquired.

The cost of the building that has been erected by the owning governmental unit is the construction cost of the original building and any subsequent additions or remodeling, plus any miscellaneous expenses of the governmental unit which are connected with the construction and acquisition of the building and additions, such as advertisements for contracts and expenses connected with the sale of bonds, less the estimated cost of any part of the building that has been removed. The cost of a building does not include debt service costs (payments of principal, interest on debt, and agents' fees).

05.02 13 00 00 **State Education Authority and State Department of Education Areas in Building**

The areas of the spaces occupied respectively by the State education authority and the State department of education.

05.02 13 01 00 *State Board of Education*

The area of a building occupied by the State Board of Education and staff members assigned directly to it.

05.02 13 02 00 *Other State Education Authority*

The area of a building assigned to any other State authority and to its staff members.

05.02 13 03 00 *General Management*

The area of a building occupied by those personnel responsible for carrying out the major function of general management.

05.02 13 04 00 *Planning, Research, Development, and Evaluation*

The area of a building occupied by those personnel responsible for carrying out the major function of planning, research, development, and evaluation.

05.02 13 05 00 *Consultative Services*

The area of a building occupied by those personnel responsible for carrying out the major function of consultative services.

05.02 13 06 00 *Distribution of Resources*

The area of a building occupied by those personnel responsible for carrying out the major function of distribution of resources.

05.02 13 07 00 *Internal Services*

The area of a building occupied by those personnel responsible for carrying out the major function of internal services.

05.02 13 08 00 *Operation or Approval of Programs and Schools*

The area of a building occupied by those personnel responsible for carrying out the major function of operation or approval of programs and schools.

05.02 13 99 00 *Other State Education Authority and State Department of Education Areas in Building*

Any other State education authority and State department of education areas in building.

05.02 14 00 00 **Office Areas of Building**

05.02 15 00 00 **Circulation Areas of Building**

A circulation area is an area used for general traffic, omitting such areas as unit-contained corridors and stairs located within a unit or suite. These areas are measured in square feet and are usually divided into two categories: circulation areas inside the building and area of covered passageways outside the building.

05.02 16 00 00 **Functional Areas in Building**

The number of areas and the square footage of areas used for functional or service purposes.

05.02 16 01 00 *Staff Library*

05.02 16 02 00 *Storage*

05.02 16 03 00 *Cafeterias or Lunchrooms*

The number of cafeterias and the square footage of cafeterias and lunchrooms. Cafeterias and lunchrooms are areas specifically designed or adapted for use in preparing and serving meals for State education agency personnel or other groups and providing facilities for eating such meals.

05.02 16 04 00 *Conference or Staff Rooms*

Number of conference or staff rooms and the square footage of those rooms used by the staff of the State education agency and other groups for such purposes as conferences, staff meetings, and seminars.

05.02 16 05 00 *Toilet Rooms*

Number of toilet rooms and the square footage of those rooms used for toilet facilities.

05.02 16 99 00 *Other Functional Areas in Building*

Any other functional areas in building not listed or defined above.

145

05.02 17 00 00 **Building Service Systems**

A service system is a group of elements or units designed to work together to provide, on a buildingwide basis, specific physical services such as cooling, heating, ventilating, water supply, and sewage disposal.

05.02 17 01 00 *Heating*

The type of system used to provide heat for the building. Various descriptors include: central heating system, radiators and convectors, unit ventilators, gravity warm air furnace, fan blast or forced air, radiant panel, and split system.

05.02 17 02 00 *Cooling*

A building service system designed to keep the temperature inside the building below that outside the building. Usual types include central cooling system, local zone cooling system, and individual cooling units.

05.02 17 03 00 *Ventilating*

A building service system designed to provide a sufficient flow of air to remove odors and to create a feeling of comfort for those in the building. Types of ventilating systems are usually classified as window ventilation, gravity ventilation, mechanical exhaust ventilation, and mechanical supply ventilation.

05.02 17 04 00 *Water Supply and Sewage Disposal*

The source of water supply (e.g., municipal water system, drilled well, dug well, or other source) and the type of sewage treatment and disposal system (e.g., municipal system, open settling tank system, and septic tank system).

05.02 17 05 00 *Electrical*

A building service system designed to distribute electricity to an entire building or selected areas of a building. Usual descriptive terms are building completely wired, partially wired, and emergency lighting system.

05.02 17 99 00 *Other Building Service Systems*

05.02 18 00 00 **Communication Systems**

Service systems designed to provide for communication within and between buildings.

05.02 18 01 00 *Telephone*

A communication system having at least one telephone in each office within a building or buildings.

05.02 18 02 00 *Intercommunication*

A communication system having both a speaker and a transmitter within all or part of the rooms within a given building.

05.02 18 03 00 *Remote*

A system providing for communication within the State.

05.02 18 03 01 Telephone

Communication between stations by use of the telephone.

05.02 18 03 02 Teletype

A communication system using teletype equipment whereby the message is typed manually at the sending station and automatically typed out at the receiving station.

05.02 18 03 03 Computer Terminal

A communication system whereby a computer is used in the transmission and reception of data.

05.02 18 03 04 Radio

A communication system whereby messages are transmitted between stations by means of radio transmitters and receivers.

05.02 18 03 99 Other Remote System

Any other remote communication system not listed or defined above.

145

05.02 19 00 00 **Television System**

A communication system whereby images are transmitted and reproduced by means of television transmitting and receiving equipment.

05.02 19 01 00 *Program Origination*

Program origination is provided by television cameras at associated studio or mobile facilities for transmission.

05.02 19 01 01 Open Circuit

Transmission of television programs over assigned broadcast channels.

05.02 19 01 02 Closed Circuit

Transmission of television programs over closed channels to a limited number of interconnected receivers.

05.02 19 01 99 Other Program Origination

Any other means of television program origination.

05.02 19 02 00 *Program Reception*

Television facilities which provide for program reception but do not provide for transmission of television programs.

05.02 19 02 01 Open Circuit

Reception of television programs, broadcast over assigned channels, by means of standard receivers.

05.02 19 02 02 Closed Circuit

Reception of television programs transmitted over closed channels.

05.02 19 02 99 Other Program Reception

Any other means of television program reception.

05.02 20 00 00 **Fire Protection System**

A building service system designed to protect the buildings and occupants from fire, consisting of such elements as fire alarm boxes and gongs, automatic sprinkler systems, fire hose cabinets, and fire extinguisher stations.

05.02 21 00 00 **Elevators and Escalators**

A building service system designed and installed in accordance with applicable codes for the purpose of conveying passengers to different levels within a building.

05.02 22 00 00 **Adequacy of Building**

This item provides for the recording of information concerned with the evaluation of a building in terms of its suitability for housing personnel and equipment engaged in carrying out State education agency functions. Items of information to be recorded will be determined by State law, regulations, and practice.

05.02 99 00 00 **Other Building Identification**

Other major characteristics by which a building may be identified.

05.03 00 00 00 EQUIPMENT IDENTIFICATION

Equipment is defined as any instrument, machine, apparatus, or set of articles which (a) retains its original shape and appearance with use and (b) is nonexpendable; i.e., if the article is damaged or some of its parts are lost or worn out, it is usually more feasible to repair it than to replace it with an entirely new unit.

Equipment may be accounted for either under unit control or under group control. Unit control means that a piece of equipment is accounted for as a single unit or entity in itself and that it retains its separate identity in the records, either on an individual record card or form, or as a line item in a ledger. Group control means that equipment items which are the same with respect to function, material, shape, and size are accounted for as a group rather than as single units. That is, the individual piece of equipment loses its identity as such and is one of a group.

05.03 01 00 00 **Kinds of Equipment**

The kinds of equipment accounted for either under unit control or under group control.

05.03 01 01 00 *Furniture*

Movable equipment that is used for sitting; as a support for writing, drawing, experimentation, and

147

work activities; as storage space for material items; or as decoration. Examples are executive-type desks, divans, conference tables, and room-size rugs.

05.03 01 02 00 *Machinery and Apparatus*

Machinery consists of movable equipment items composed of complex combination of parts which tramsmit and modify force and motion so as to perform some desired kind of work. Vehicles are excluded. *See also* VEHICLES.

Apparatus consists of movable equipment items, without complex combinations of parts, that are used to transmit, modify, or measure energy or matter in some form.

05.03 01 03 00 *Hand Tools*

Instruments, machinery, and apparatus that may be picked up in the hands and which are moved as individual units during the performance of their primary functions. Examples of equipment designated by this title are electric hand saws, power mowers, vacuum cleaners, drills, sanders, electric flatirons, expensive tap and die sets, wrench sets, and micrometer sets.

05.03 01 04 00 *Bench, Desk, or Floor Machinery and Apparatus*

Machinery and apparatus that, under normal operation, remains stationary on a bench, desk, or floor during operation. Examples of equipment designated by this title are typewriters, duplicators, dishwashing machines, clothes dryers, drill presses, metal and wood turning lathes, stoves, barographs, and electric tube testers.

05.03 01 05 00 *Heavy Construction Machinery*

Self-propelled and attachment type machinery or apparatus that is used in heavy construction work, such as excavating, constructing buildings, roads, and sidewalks, and demolishing buildings. Examples of equipment designated by this term are cranes, compressors, self-propelled rollers, bulldozers, graders, scrapers, power shovels, caterpillars, pile drivers, and concrete mixers. Major attachments that can be operated interchangeably with two or more pieces of heavy construction machinery are accounted for separately. Vehicles, such as dump trucks, concrete mixer trucks, and water sprinkling trucks, which may be used in connection with heavy construction work are not designated by this term; they are designated as Vehicles.

05.03 01 06 00 *Vehicles*

Conveyances used to transport persons or objects, such as automobiles, trucks, aircraft, wreckers, buses, station wagons, bookmobiles, tractors, wagons, and boats, including trailer-type and other attachments operated from such vehicles. Major attachments that can be operated interchangeably with two or more vehicles are accounted for separately.

05.03 01 07 00 *Electronic and Electromechanical*

Equipment operated by the action of electrons and equipment operated by a combination of electrical and mechanical devices.

05.03 01 07 01 Television

Equipment used in the process of transmitting or receiving images utilizing radio waves or electrical conductors such as cables. Such equipment as television cameras, sets, mobile units, antennas, transmitters, and receivers would be included in this classification.

05.03 01 07 02 Radio

Equipment used in the process of communicating over a distance by converting sounds or signals into electromagnetic waves and transmitting these through space, without connecting wires, to a receiving set which changes them into the original sounds or signals.

05.03 01 07 03 Computer

An electronic machine which, by means of stored instructions and information, performs rapid and complex calculations or compiles, correlates, and selects data.

05.03 01 07 99 *Other Electronic and Electromechanical*

Any other electronic and electromechanical equipment not listed and defined above.

05.03 02 00 00 **Accounts for Each Piece of Equipment**

The following accounts, through 05.03 02 99 00, indicate the information that may be kept for each piece of equipment that is under unit or group control. When an equipment item is replaced by another and the old equipment is disposed of, these accounts are removed from the record and new accounts established for the new equipment item.

05.03 02 01 00 *Name*

The name of the equipment item as given by the manufacturer.

05.03 02 02 00 *Manufacturer and Model Number*

The name of the manufacturer and the model number as assigned by the manufacturer.

05.03 02 03 00 *Cost (For Records of Owning Unit Only)*

The purchase price paid by the owning unit plus any freight and installation charges. When a piece of equipment has been acquired as a gift, or at no cost, the entry for its cost is zero plus any costs connected with acquiring, installing, and conditioning it for use, with an indication that it was received as a gift or at no cost to the owning unit. When the actual cost of a piece of equipment is not known, the estimated cost at time of acquisition is used as the cost figure. When new attachments are added to the equipment item, this account is increased by the cost of such attachments; it is decreased by the cost of such attachments when the attachments are permanently removed from the piece of equipment.

05.03 02 04 00 *Date of Acquisition*

The date on which the owning unit consummated the transfer of ownership of the original item of equipment or, if constructed by employees of the owning unit, the date on which the construction was completed as acceptable. For leased or rented property this date is the date on which the lease or rent begins.

05.03 02 05 00 *Design Life*

The period of time during which the quipment is estimated to serve its function.

05.03 02 06 00 *Anticipated Useful Life*

The estimated period of time that the equipment will serve its function in a satisfactory manner in view of the conditions to which it is subjected.

05.03 02 07 00 *Date of Disposal*

The date on which the equipment item was sold or otherwise disposed of so that the unit no longer retains it for any purpose. When the actual date of a loss or theft is not known, the date of disposal is the date the loss or theft was noted.

05.03 02 08 00 *Description of Equipment*

The description of the equipment item as contained in the manufacturer's catalog or an abbreviated version of it.

05.03 02 99 00 *Other Accounts for Each Piece of Equipment*

Any other accounts not listed and defined above.

05.03 03 00 00 **Ownership of Equipment**

Designation of the governmental agency which acquired the equipment through purchase or by other means.

05.03 03 01 00 *Public*

Equipment owned by any governmental agency.

05.03 03 01 01 State

Equipment owned by any State governmental agency (except a State authority).

05.03 03 01 02 Authority

Equipment owned by any authority which is an agent of the State government.

05.03 03 01 03 Federal

Any equipment owned by the Federal Government or any agency thereof.

05.03 03 01 99 Other Public

Equipment owned by any governmental agency other than those listed above.

05.03 03 02 00 *Nonpublic*

Any equipment, other than publicly owned, that is used by a State education agency and is under its jurisdiction.

05.03 03 02 01 Rented

Equipment, owned by any individual or agency other than the State education agency, which is rented, usually on a monthly basis.

05.03 03 02 02 Leased

Equipment, owned by any individual or agency other than the State education agency, which is leased, usually on an annual basis.

05.03 03 02 03 Contract-Purchase Agreement

Equipment which is acquired by a lease contract with the option of purchase at a later date, with the lease payments or a part thereof applying toward purchase price.

05.03 03 02 99 Other Nonpublic

Any nonpublicly owned equipment not listed above.

05.03 03 99 00 *Other Ownership of Equipment*

Any other ownership of equipment not listed or defined above.

05.03 04 00 00 **Purpose for Which Equipment is Used**

When equipment is used for more than one major purpose, it is designated in terms of principal use.

05.03 04 01 00 *Program Support*

That equipment which is assigned specifically for the support of a particular program within the State agency. An example is a typewriter assigned for full-time use by the office of the Director of Curriculum.

05.03 04 02 00 *Nonprogram Support*

Equipment not assigned to a particular program but rather assigned for departmentwide support. Examples are a mimeograph machine or data processing equipment used for such purposes.

05.03 04 99 00 *Other Purpose for Which Equipment is Used*

Any other purpose for which equipment is used not listed or defined above.

05.03 05 00 00 **Assignment of Equipment**

The State agency or supporting services facility at which the equipment is used regularly. If equipment is assigned to more than one agency, more than one support services facility, or combinations of the two, or if it is in storage, such information should be shown on a record form. If equipment is housed in a different location from its assignment, this information should also be shown on a record form.

05.03 06 00 00 **Adequacy of Equipment**

This item provides for the recording of information concerned with the evaluation of equipment in terms of function. Items of information to be recorded will be determined by State law, regulations, and practice.

05.03 99 00 00 **Other Equipment Identification**

Any other items of information relating to equipment not listed or defined above.

GLOSSARY

This section contains definitions of selected terms *as used in this handbook* and such additional terms as seem necessary to common understanding concerning State education agencies. Extensive use of the glossary will help to establish a high degree of comparability in State education agency records and reports. The glossary is arranged alphabetically with appropriate cross-referencing.

Some of the definitions have been taken from Handbooks I,[1] II,[2] III,[3] IV,[4] V,[5] and VI,[6] in the *State Educational Records and Reports Series.* In such cases, the definition used in this handbook is taken from the latest handbook in which the term is defined . Where a definition has been modified, the handbook reference is given, e.g., I, II, III, IV, V, and VI, followed by the letter "M".

[1] Paul L. Reason; Emery M. Foster; and Robert F. Will, *The Common Core of State Educational Information.* Washington: U.S. Government Printing Office, 1953. U.S. Department of Health, Education, and Welfare, Office of Education, State Educational Records and Reports Series: Handbook I, Bulletin 1953, No. 8.

[2] Paul L. Reason and Alpheus L. White, *Financial Accounting for Local and State School Systems, Standard Receipt and Expenditure Accounts.* Washington; U.S. Government Printing Office, 1957. U.S. Department of Health, Education and Welfare, Office of Education, State Educational Records and Reports Series: Handbook II, Bulletin 1957, No. 4.

[3] Paul L Reason and George G. Tankard, Jr., *Property Accounting for Local and State School Systems.* Washington: U.S. Government Printing Office, 1959. U.S. Department of Health, Education, and Welfare, Office of Education, State Educational Records and Reports Series: Handbook III, Bulletin 1959, No. 22.

[4] Allan R. Lichtenberger and Richard J. Penrod, *Staff Accounting for Local and State School Systems.* Washington: U.S. Government Printing Office, 1966. U.S. Department of Health, Education, and Welfare, Office of Education, State Educational Records and Reports Series: Handbook IV, Bulletin 1965, No. 18.

[5] John F. Putnam and George G. Tankard, Jr., *Pupil Accounting for Local and State School Systems.* Washington: U.S. Government Printing Office, 1964. U.S. Department of Health, Education, and Welfare, Office of Education, State Educational Records and Reports Series: Handbook V, Bulletin 1954, No. 39.

[6] John F. Putnam and W. Dale Chismore, *Standard Terminology for Curriculum and Instruction in State and Local School Systems.* Washington: U.S. Government Printing Office, 1970. U.S. Department of Health, Education, and Welfare, Office of Education, State Educational Records and Reports Series: Handbook VI, Bulletin 1970, No. 23052.

151

Accountability—The capability and the responsibility to account for the expenditure of money and the commitment of other resources in terms of the results achieved. This involves both the stewardship of money and other resources and the evaluation of achievement in relation to specified goals.

Accounting—The procedure of maintaining systematic records of happenings, occurrences, and events relating to persons, objects, or money and summarizing, analyzing, and interpreting the results of such records. (IV)

Accounts Payable—Unpaid balances or invoices which are due and owing to private persons, firms, governmental units, or others. (II M)

Accounts Receivable—Amounts owed to the State authority or agency by private persons, firms, governmental units, or others. (II M)

Accrual Basis—The basis of accounting under which revenues are recorded when earned or when levies are made, and expenditures are recorded as soon as they result in liabilities, regardless of when the revenue is actually received or the payment is actually made. (II)

Accrue—To record revenues when earned or when levies are made, and to record expenditures as soon as they result in liabilities, regardless of when the revenue is actually received or the payment is actually made. Sometimes, the term is used in a restricted sense to denote the recording of revenues earned but not yet due, such as accrued interest on investments and the recording of expenditures which result in liabilities that are payable in another accounting period, such as accrued interest on bonds. (II)

Accrued Expenses—Expenses which have been incurred and are recorded in the accounts but which have not yet been paid. (II M)

Accrued Interest—Interest, either payable or receivable, accumulated between interest dates but not yet due. (II M)

Accrued Liability—Amounts owed but not yet due; for example, accrued interest on bonds or notes. (II)

Accrued Revenue—Revenue which has been earned, is receivable, and has been recorded in the accounts, but has not been collected. (II M)

Activities—As used in this handbook, activities represent the purposeful actions on the part of board members or staff members in carrying out their respective duties and responsibilities.

Administration—Those activities which have as their purpose the general direction, execution, and control of the affairs of any given organizational unit.

Administrative Action—Any action which results in the general regulation, direction, or control of the affairs of the organizational unit.

Administrative Unit—A geographic area which, for specified public school purposes, is under the control of a board of education and the supervision of one or more administrative officers. (VI)

Adult Education—Instruction and services designed to meet the unique needs of adults and youth—beyond the age of compulsory school attendance—who have either completed or interrupted their formal education. This may be provided by a school system, college, or other agency or institution through activities and media such as formal classes, correspondence study, radio, television, lectures, concerts, demonstrations, and counseling. *See also* CONTINUING EDUCATION. (VI)

Advisory Council—A group of persons appointed under legislative or regulatory authority, to provide advice, consultation, or counsel in one or more areas of concern. Such council may be temporary—to accomplish a specific preconceived purpose—or it may be of a standing or permanent nature.

Aggregate Days Attendance—The sum of the days present (actually attended) of all pupils when school is in session during a given reporting period. Only days on which the pupils are under the guidance and direction of teachers should be considered as days in session. (V)

Apparatus—Movable equipment items, without complex combinations of parts, that are used to transmit,

modify, or measure energy or matter in some form. (III)

Appraisal—(1) The act of making an estimate of value, particularly of the value of property, by systematic procedures that include physical examination, pricing, and engineering estimates. (2) The value established by estimating. (III)

Appropriation—As used in this handbook, spending authority provided by legislative action for the support of education.

Assets—All property or resources, such as accounts receivable, notes receivable, cash, inventory, equipment, and real estate.

Attendance—Presence of a pupil on days when school is in session. Pupils participating in school-sponsored activities under the guidance and supervision of staff members, either at or away from school, are considered to be in attendance. (V)

Attendance Center—The location where pupils residing in a given geographic area attend school.

Attribution—A procedure for allocating costs, employee time, or property use among several functions, programs, organizational units, or other dimensions, on the basis of the best possible estimate; may be used when objective data are not available for proration.

Audiovisual Aids—Optical, electronic, and other devices—and related supplies—which are designed to enhance learning through the combined senses of hearing and sight, e.g., sound, motion pictures, printed materials, and television. Frequently, two or more of these components are combined into electronic distribution systems, some of which incorporate remote or dial access capabilities. *See also* EDUCATIONAL MEDIA.

Audit—Examination of departmental documents, records, and accounts for the purpose of (1) determining the propriety of transactions, (2) ascertaining whether all transactions have been recorded properly, and (3) determining whether statements drawn from accounts reflect an accurate picture of financial operations and financial status. (II M)

Average Daily Attendance (ADA)—The aggregate days attendance of a given school during a given reporting period divided by the number of days school is in session during this period. Only days on which the pupils are under the guidance and direction of teachers should be considered as days in session. The reporting period is generally a given regular school term. The average daily attendance for groups of schools having varying lengths of terms is the sum of the average daily attendance obtained for the individual schools. For purposes of obtaining statistical comparability *only,* pupil-staff ratios involving kindergarten and prekindergarten pupils attending a half day session are computed as though these pupils are in membership for a half day. (VI)

Average Daily Membership (ADM)—The aggregate days membership of a given school during a given reporting period divided by the number of days school is in session during this period. Only days on which the pupils are under the guidance and direction of teachers should be considered as days in session. The reporting period is generally a given regular school term. The average daily membership for groups of schools having varying lengths of terms is the sum of the average daily membership obtained for the individual schools. For purposes of obtaining statistical comparability *only,* pupil-staff ratios involving kindergarten and prekindergarten pupils attending a half day session are computed as though these pupils are in membership for a half day. (VI)

Balance Sheet—A formal statement of assets, liabilities, and fund balance as of a specific date.

Bond Discount—The excess of the face value of a bond over the price for which it is acquired or sold. The price does not include accrued interest at the time of acquisition or sale. (II)

Budget—A plan of operation embodying an estimate of proposed expenditures for a given period or purpose and the proposed means of financing them. The budget usually consists of three parts. The first part contains a message from the budget-making authority together with a summary of the proposed expenditures and the means of financing them. The second part consists of schedules supporting the summary. The schedules show in detail the proposed expenditures and means of financing them together

with information as to past years' actual revenues and expenditures and other data used in making the estimate. The third part is composed of drafts of the appropriation, revenue, and borrowing measures necessary to put the budget into effect. (II M)

Capital Outlay—An expenditure which results in the acquisition of fixed assets or additions to fixed assets. It is an expenditure for land or existing buildings, improvement of grounds, construction of buildings, additions to buildings, remodeling of buildings, or initial or additional equipment. Includes installment or lease payments on property (except interest) which have a terminal date and result in the acquisition of property. (V)

Cataloging—Activities involved in classifying educational media according to an established classification system and building a catalog to facilitate information retrieval which includes listings according to such information as subject, author, title, and producer.

Categorical Aid—Educational support funds provided from a higher governmental level and specifically limited to (earmarked for) a given purpose, e.g., special education, transportation, or vocational education.

Certificate—The legal document giving authorization from the State (or an agency or an organization authorized by the State) to perform certain specific services in the field of education. (Sometimes used synonymously with "license.") (IV M)

Certificate Endorsement—The information included in or added to an issued certificate specifically indicating the services which the certificate holder is authorized to perform. (IV)

Certification—The process of reviewing and evaluating the training and experience of applicants for the issuance of credentials, in accord with policy or legal requirements established by appropriate State educational authority or by State constitutional or legislative provisions.

Certificate of High School Equivalency—A formal document issued by a State department of education or other authorized agency certifying that an individual has met the State requirements for high school graduation equivalency by (a) attaining satisfactory scores on an approved examination or (b) earning the required number of credits in an organized program of approved instruction. (V)

Chief State School Officer—The chief executive officer of the State department of education.

Civil—Pertaining to a community of citizens, their government, or their interrelations.

Civil Defense—A program designed to provide adequate defense for a community of citizens against loss of life or property due to war or natural disaster.

Civil Rights—Those rights guaranteed to the individual by the constitution and congressional acts. *See also* HUMAN RIGHTS.

Classroom—A space designed or adapted for regularly scheduled group instruction. This includes the so-called regular classrooms and special use classrooms such as laboratories and shops but excludes such rooms as auditoriums, lunch rooms, libraries, and gymnasiums. (V M)

Clerical Personnel—Staff members assigned activities such as preparing, transferring, transcribing, systematizing, or preserving written communications and records; or the operation of such machines as bookkeeping machines, card punching machines, duplicating machines, and tabulating machines. (IV M)

Cocurricular Activities—Activities, under the sponsorship or direction of the school, of the type for which participation generally is not required and credit generally is not awarded. (VI)

Coding—Distinguishing among items and categories of information by assigning numbers or other symbolic designations so that the items and categories are readily identifiable. (V M)

College—A postsecondary school which offers general or liberal arts education, usually leading to a first degree. For the purposes of this handbook, junior colleges and community colleges may be included under this terminology.

Commission—A group of people chosen by appropriate authority to perform certain duties or tasks, or to exercise certain powers.

Community College—As used in this handbook, a junior college usually operated by the board of education of a local basic administrative unit (including the independent local board for one or more community colleges). Instruction is adapted in content, level, and schedule to the needs of the local community. *See also* JUNIOR COLLEGE. (VI)

Comprehensive High School—A secondary school with a number of departments (e.g., academic, industrial, business, and vocational) offering a diversified program to meet the needs of pupils with varying interests and abilities. (VI)

Computer Programing—Preparation of a logical sequence of operations to be performed by a computer in solving a problem or processing data; the preparation of coded instructions and data for such a sequence.

Consultant—A person who gives professional or technical advice and assistance. A consultant may perform his services under contract (purchased services) or he may be an employee on the payroll of a State agency. Consultative services referred to in this handbook (03.03 00 00 00) are performed primarily by staff members on the payroll of a State agency.

Consultative—Relating to consultation, advice, assistance, and counsel. Consultative services may be performed under contract (purchased services) or by an employee on the payroll of a State agency. Consultative services referred to in this handbook (03.03 00 00 00) are performed primarily by staff members on the payroll of a State agency.

Continuing Contract—A contract which continues automatically from year to year without action on the part of the governing authority but which may be terminated through appropriate action on the part of the parties involved. (IV)

Continuing Education—A combination of subject matter and experiences designed to provide opportunity for an individual (adult or out-of-school youth)—not in a regularly prescribed program of studies—to develop skills and knowledge concerned with upgrading interests and abilities on a continuing, life-long basis. Usually, these interests and abilities apply to long-range objectives which may be related to employment, family life, recreation, investments, and other areas of concern. *See also* ADULT EDUCATION.

Contracted Services—Services rendered through contract or other agreement with a firm, company, individual, or other agency or institution, such services being performed by a person or persons not on the regular payroll. Personnel records are not usually maintained for persons performing contracted services, nor are these persons usually eligible for personnel benefits that may accrue to staff members. *See also* PURCHASED SERVICES. (VI M)

Controller—A staff member performing assigned activities in connection with the control of expenditures in terms of budgetary restrictions and the certification of the legality of expenditures in accordance with applicable laws and regulations. (IV)

Coordination—Activities which have the purpose of unifying programs for the accomplishment of common objectives. The coordination of programs may be within the State department of education or between programs within the department and programs outside the department. (IV M)

Correctional Schools—Schools for those pupils who, because of severe antisocial behavior, cannot be allowed to participate in the regular school program.

Cost Accounting—That method of accounting which provides for the assembling and recording of all the elements of cost incurred to accomplish a purpose, to carry on an activity or operation, or to complete a unit of work or a specific job. (II)

Cost Benefit—Analyses which provide the means for comparing the resources to be allocated to a specific program with the results *likely* to be obtained from it; or, analyses which provide the means for comparing the results *likely* to be obtained from the allocation of certain resources toward the achievement of alternate or competing objectives.

Cost Center—The smallest segment of a program that

is separately recognized in the agency's records, accounts, and reports. Program-oriented budgeting, accounting, and reporting aspects of an information system are usually built upon the identification and use of a set of cost centers.

Cost Effectiveness—Analyses designed to measure the extent to which resources allocated to a specific objective under each of several alternatives *actually* contribute to accomplishing that objective, so that different ways of gaining the objective may be compared.

Course—An organization of subject matter and related learning experiences provided for the instruction of pupils on a regular or systematic basis, usually for a predetermined period of time (e.g., a semester, a regular school term, or a 2-week workshop). (VI)

Course of Study—A written guide prepared by administrators, supervisors, consultants, and teachers of a school system or school, or by consultants and other specialists at the State level, as an aid to teaching a given course or an aspect of subject-matter content to a given type of pupil. (VI M)

Credential—The document issued by the State (or an agency or organization authorized by the State) authorizing the holder to perform services of a given type. "Certificate," "license," or "permit" are examples of terms frequently used interchangeably with "credential." (IV M)

Credit—The unit of value, awarded for the successful completion of certain courses, intended to indicate the quantity of course instruction in relation to the total requirements for a diploma, certificate, or degree. Credits are frequently expressed in terms such as "Carnegie units," "credits," "semester credit hours," and "quarter credit hours." (VI)

Curriculum—The planned interaction of pupils with instructional *content,* instructional *resources,* and instructional *processes* for the attainment of educational objectives. (VI M)

Curriculum Guide—A written plan including one or more aspects of curriculum and instruction such as philosophy, policies, aims, objectives, subject matter, resources, and processes. Such a plan may be as narrow in scope as a unit or topic of instruction, or as broad as the entire curriculum of a school system or level of instruction within a State. *See also* COURSE OF STUDY. (VI)

Data Bank—A comprehensive collection of data, usually in machine-usable form (such as punch cards, tapes, and discs), which can be used for such purposes as drawing subsamples for special studies, checking hypotheses not formulated or tested previously, facilitating historical studies, and deriving summations and correlations. Typically, an educational data bank is comprised of component files relating to specific areas of information such as pupils, staff, property, finance, instructional programs, and the community.

Day of Attendance—A school day during which a pupil is present for an entire school session under the guidance and direction of teachers. When a pupil is present for only part of a session, his attendance should be counted according to the nearest half day of attendance. If overcrowded conditions make it necessary for a school to hold two separate sessions per day, a pupil attending for all of either session should be considered as having completed a whole day of attendance. An excused absence during examination periods or because of sickness or for any other reason should not be counted as a day of attendance. (V)

Day in Session—A day in which the school is open and the pupils are under the guidance and direction of teachers. On some days the school plant may be closed and the student body as a whole engaged in school activities outside the school plant under the guidance and direction of teachers. Such days should be considered as days in session. Days on which school is closed for such reasons as holidays, teachers' institutes, and inclement weather would not be considered as days in session. (V)

Debt Service—Expenditures for the retirement of debt and expenditures for interest on debt, except principal and interest of current loans. (III)

Degree—A title conferred by a college or university as official recognition for the completion of a program of studies or for other attainment. (V)

Demographic Studies—Studies pertaining to vital statistics such as births, deaths, marriages, ethnic groups, and mobility of populations.

Demonstration—As used in this handbook, an explanation by example or experiment; a practical showing of how something works or is used.

Development—Activities concerned with the evolving process of utilizing the products of research and considered judgment in the deliberate improvement of educational programs.

Differentiated Curriculum—A program of educational offerings designed to meet the unique needs of pupils comprising special target populations.

Direct Costs—Those elements of cost which can be easily, obviously, and conveniently identified with specific activities or programs, as distinguished from those costs incurred for several different activities or programs and whose elements are not readily identifiable with specific activities or programs. *See also* INDIRECT COSTS. (II M)

Disbursements—Payments in cash. (II)

Dissemination of Information—As used in this handbook, the transmitting of pertinent educational information to the educational community, the general public, the State legislature, the Federal Government, or the various news media.

Double Entry—A system of bookkeeping which requires for every entry to the debit side of an account or accounts an entry for the corresponding amount or amounts to the credit side of another account or accounts. (II)

Dual Enrollment—An arrangement whereby a pupil regularly and concurrently attends two schools which share direction and control of his studies. (VI M)

Early Childhood Education—Educational experiences provided by the school at the preprimary and primary levels. *See also* PREPRIMARY (VI)

Educational Community—That body of persons, usually considered to be nationwide, which is actively engaged in the educational enterprise.

Educational Media—Any devices, content materials, methods, or experiences used for teaching and learning purposes. These include printed and nonprinted sensory materials. *See also* AUDIOVISUAL AIDS.

Employee Benefits—Compensation, in addition to regular salary, provided to an employee. This may include such benefits as health insurance, life insurance, annual leave, sick leave, retirement, and social security.

Encumbrances—Purchase orders, contracts, and salary or other commitments which are chargeable to an appropriation and for which a part of the appropriation is reserved. They cease to be encumbrances when paid or when actual liability is set up. (I)

Endowment Fund—A fund from which the income may be expended, but whose principal must remain intact. (I)

Equipment—Any instrument, machine, apparatus, or set of articles which (a) retains its original shape and appearance with use and (b) is nonexpendable; i.e., if the article is damaged or some of its parts are lost or worn out, it is usually more feasible to repair it than to replace it with an entirely new unit. (VI)

Expenditures—Charges incurred, whether paid or unpaid, which are presumed to benefit the current fiscal year. (II)

External Services—As used in this handbook, services provided to any agency, institution, organization, or individual outside the State education agency.

Fee—A payment, charge, or compensation for services (other than instruction), for privileges, or for the use of equipment, books, or other goods. (VI)

Financial Accounting—The recording and reporting of activities and events affecting the money of an administrative unit and its program. Specifically, it is concerned (1) with determining what accounting records are to be maintained, how they will be maintained, and the procedures, methods, and forms to be used, (2) with recording, classifying, and summarizing activities or events, (3) with analyzing and interpreting recorded data, and (4) with preparing and initialing reports and statements which

157

reflect conditions as of a given date, the results of operations for a specific period, and the evaluation of status and results of operation in terms of established objectives.

Fiscal Period—Any period at the end of which an agency determines its financial condition and the results of its operations and closes its books. It is usually a year, though not necessarily a calendar year. The most common fiscal period is from July 1 through June 30. (II M)

Flow-through Budget—A plan of financial operation for the handling of those funds which constitute neither a receipt nor an expenditure of the State department or agency. Rather, such funds are distributed by the State department as an intermediary. Federal and State support funds are the most common examples of flow-through money.

Foundation Program—A system whereby State funds are used to supplement local or intermediate district funds in the support of education at the elementary and secondary levels. Such a program usually guarantees a "minimum foundation" of financial support from State funds regardless of the financial ability of the local or intermediate district to support education. The extent to which a foundation program equalizes the educational opportunity of pupils varies among the several States.

Full-time Staff Member—A staff member whose total current assignments, regardless of their classification, require his services each working day at least a number of hours equal to the number of hours of a regular working day. (VI M)

Function—One of a major group of related actions which contributes to a larger action. In a State education agency, the major groups of related actions (functions) as delineated in this handbook are as follows: (1) General Management, (2) Planning, Research, Development, and Evaluation, (3) Consultative Services, (4) Distribution of Resources, (5) Internal Services, and (6) Operation or Approval of Programs and Schools. The larger action, or central purpose, is education. *See also* MAJOR FUNCTION.

Fund—An independent accounting entity with its own assets, liabilities, and fund balances. Generally, funds are established to account for financing of specific activities of an agency's operations.

General Aid—Educational support funds provided from a higher governmental level which are not limited to any specific program or purpose but which may be used in financing the general educational program as seen fit by the recipient governing authority.

General Ledger—The group of basic accounts of a fund, including those summary accounts for which detailed subsidiary ledgers are maintained.

Governing Authority—A government official, board, or commission, legally authorized by the constitution or by legislation to assume jurisdiction and responsibility in a specific field of government.

Governmental Agencies—Any subdivisions of any governmental level—local, State, or Federal.

Grade—That portion of a school program which represents the work of one regular school term, identified by a designation such as kindergarten, grade I, or grade I0. (VI)

Graduate Study—College level courses of study beyond undergraduate study which may lead to such graduate degrees as the master's degree and doctor's degree. (IV)

Graphic Arts—As used in this handbook, the planning and execution of art layouts by use of sketches, pictures, or diagrams to illustrate educational programs or processes for publication, demonstration, and more effective communication.

Higher Education—Education above the instructional level of the secondary school, usually beginning with grade I3, which is provided by colleges, universities, graduate schools, professional schools, and other degree granting institutions. (VI M)

Human Rights—Just claims to the elimination of want, religious and racial discrimination, and to equal educational and employment opportunity. *See also* CIVIL RIGHTS.

Implementation—As used in this handbook, the

process of putting into effect something which has proved to be feasible and desirable.

Incomplete High School—A secondary school which offers less than 4 full years of work beyond grade 8 in a school system that is organized in such a manner that grades PreK, K, or 1 through 8 constitute the elementary grades. These are sometimes called "truncated high schools." (V)

Indian Education—Educational experiences provided for American Indian pupils.

Indirect Costs—Those which cannot be easily or readily identified with a specific program or activity.

Inservice Education or Training—As used in this handbook, a program of systematized activities promoted or directed by the State education agency, or approved by the State education agency, contributing to the professional or occupational growth in competence of board members and State staff members during the time of their service to the agency. College credit programs are not regarded in this handbook as inservice education or training. (IV M)

Institutional—Pertaining to an organization having a social, educational, or religious purpose, as a school, church, hospital, or reformatory.

Instructional Level—An indication of the general nature and difficulty of instruction, e.g., elementary instructional level, secondary instructional level, and postsecondary instructional level. (VI)

Intermediate Administrative Unit—An administrative unit smaller than the State which exists primarily to provide consultative, advisory, administrative, or statistical services to local basic administrative units, or to exercise certain regulatory functions over local basic administrative units. An intermediate unit may operate schools and contract for school services, but it does not exist primarily to render such services. Such units may or may not have taxing and bonding authority. Where there is a supervisory union board, the union is included as an intermediate unit. (VI M)

Intermediate Elementary Grades—The grades between the primary grades and the upper elementary grades or the junior high school, usually grades 4, 5, and 6. (VI)

Internal Services—As used in this handbook, those functions or activities which are necessary for and relate to the actual operation of the State department of education. This excludes those services which are rendered primarily for the benefit of agencies or institutions outside the State department of education.

Judiciary Activities—As used in this handbook, activities whereby the State education authority or the chief State school officer serves as a tribunal in holding hearings and rendering decisions regarding education-related controversies within the State.

Junior College—A postsecondary institution which offers the first two years of college instruction, frequently confers an associate degree, and does not confer a bachelor's degree. The term "junior college" is often used interchangeably with the term "community college." *See also* COMMUNITY COLLEGE. (VI M)

Junior High School—A separately organized and administered secondary school which is intermediate between the elementary grades and the senior high school, usually including grades 7, 8, and 9 (in a 6-3-3 plan) or grades 7 and 8 (in a 6-2-4 plan). (VI M)

Junior-Senior High School—A secondary school organized on a junior-senior basis and administered under one head as one unit. (VI)

Kindergarten—A group or class that is organized to provide educational experiences for children during the year immediately preceding the first grade. A kindergarten class may be organized as a grade of an elementary school or as part of a separate kindergarten school. In some school systems, such a group is called "preprimary" or "junior primary." (VI)

Letter of Credit—A letter from a bank or agency asking that the holder of the letter be allowed to draw a specified sum from other banks or agencies, to be charged to the account of the writer of the letter.

Library Books—Books purchased for general use and not primarily for use in certain classes, grades, or other particular student groups. They include reference sets and dictionaries, but not textbooks and periodicals. (III)

License—The legal document giving authorization from the State (or an agency or an organization authorized by the State) to perform certain specific services in the field of education. (Sometimes used synonymously with "certificate.")

Line-item Structure—A budgetary format wherein certain estimated receipts and expenditures appear on a given line and must be restricted to one specific purpose; such funds cannot be comingled with others.

Local Basic Administrative Unit--An administrative unit at the local level which exists primarily to operate public schools or to contract for public school services. Normally, taxes can be levied by such units for school purposes. These units may or may not be coterminous with county, city, or town boundaries. This term is used synonymously with the terms "school district" and "local education agency." (VI)

Location—As used in this handbook, the organizational unit within the State education agency to which an expenditure is to be charged.

Machine Data Processing—The use of machines and devices in the storing of individual items of information in a form by which they may be rapidly and accurately retrieved, processed, and reproduced as single-line items, as lists of items, or in desired combinations with other items. (V M)

Machinery—Movable equipment items composed of complex combinations of parts which transmit and modify force and motion so as to perform some desired kind of work, excluding vehicles. (III)

Major—As used in this handbook, a concentration of semester hours of college credit representing major specialization in a field of study. The number of college credits constituting a major is usually specified in State certification requirements.

Major Function—For purposes of this handbook, the six major functions are as follows: (1) General Management, (2) Planning, Research, Development, and Evaluation, (3) Consultative Services, (4) Distribution of Resources, (5) Internal Services, and (6) Operation or Approval of Programs and Schools. *See also* FUNCTION.

Management—Those activities which have as their purpose the general direction, execution, and control of the affairs of an agency or an organizational unit within the agency.

Management Information System—As used in this handbook, a method for providing information regarding the agency's participation in educational efforts within the State, a method for determining the amounts of effort invested by a State education agency in each of the things done by the agency itself, and a method of providing comprehensive information upon which logical management decisions can be based.

Material—As used in this handbook, this term denotes tangible resources, including both supplies and equipment.

Membership—The number of pupils on the current roll of a class or school as of a given date. A pupil is a member of a class or school from the date he enters until he withdraws. During this period, the pupil is either present or absent on each day (or half day) during which school is in session. The date of withdrawal from membership is the first day after the date of last attendance, if known; otherwise the date of withdrawal is considered to be the date on which it becomes known that the pupil left. Membership for a class or school, as of a given date, is obtained by adding the total original entries and total re-entries and subtracting the total withdrawals; it may also be obtained by adding the total number present and the total number absent. This term is also known as "the number belonging." (V)

Memorandum Accounting—Maintenance of informal records of transactions that cannot be recorded under the regular financial accounts but for which a record is desired. (II M)

Middle School—A separately organized and administered school, usually beginning with grade 5 or 6 and including at least three grades or years. Most middle schools are established and operated on the assumption that, in ultimate plan if not in present reality, the middle school will be followed by a 4-year high school, as in a 4-4-4 plan or a 5-3-4 plan. (VI M)

Migrant Education—A program of instruction and

services for those children who move periodically with their families from one school district to another in order that a parent or other member of the immediate family may secure seasonal employment.

Minor—As used in this handbook, a concentration of semester hours or quarter hours of college credit earned and representing specialization (but not major specialization) in a field of study. The number of college credits constituting a minor is usually specified in State certification requirements. (IV M)

Model—As used in this handbook, a representation made to be copied, followed, or imitated because of its feasibility, excellence, or worth.

Noncredit Course—A course for which pupils do not receive credit applicable toward graduation or completion of a program of studies. (VI)

Nongovernmental Agency—An instrumentality which is not under the authority of any governmental unit.

Nonprofessional—A position which does not require extensive training (or a bachelor's degree) and which is not considered as professional under the laws and regulations established by the State. Examples are school lunch workers, school bus drivers, and custodians.

Nonprofessional Personnel—Those personnel engaged in activities which are not considered to be professional in nature. *See also* PROFESSIONAL and NONPROFESSIONAL.

Nonpublic Ownership—Proprietorship by a nongovernmental agency.

Nonpublic School—A school established by an individual, institution, or agency other than the State, subdivisions of the State, or the Federal Government, which usually is supported primarily by other than public funds, and the operation of whose program rests with other than publicly elected or appointed officials. (V M)

Object—The commodity or service obtained from a specific expenditure. As used in this handbook, this term also includes the following:

(1) Grants and subsidies—this term does not represent a true object in the sense of denoting goods or services purchased. It is included here to allow for identifying those resources distributed to other agencies via the State education agency. This procedure prevents the distortion of the operating costs of the agency.

(2) Transfers—this term does not represent a true object in the sense of denoting goods or services purchased. It is included here to identify money taken from one fund of the agency and added to another fund of the agency. Such interfund transfers are neither receipts nor expenditures of the agency.

Obligations—Amounts which the agency will be required to meet out of its resources, including both liabilities and encumbrances. (II)

Organizational Unit—As used in this handbook, an organizational subdivision within a State education agency established for the purpose of carrying out designated functions or activities.

Paraprofessional—A staff member who works alongside a professional staff member and assists him but who does not have full professional status; e.g., teacher's aide.

Part-time Staff Member—A staff member whose total current assignments require less than his full-time services. A part-time staff member may be employed full-time for part of the year or part-time for part or all of the year. (IV M)

Per Diem—By the day; usually used in relation to payment of subsistence expenses or fees.

Permanent Building—A building designed for its site or placed upon its site and not intended to be moved. (III M)

Personnel—As used in this handbook, either employees of the State department of education or members of a State board of education.

Petty Cash—A sum of money, either in the form of currency or a special bank deposit, set aside for the purpose of making change or immediate payments of comparatively small amount. (II)

Planning—The selection or identification of the overall, long-range goals, priorities, and objectives of the organization, and the formulation of various courses of action in terms of identification of needs and relative costs or benefits for the purposes of deciding on courses of action to be followed in working toward achieving those goals, priorities, and objectives.

Planning-Programing-Budgeting-Evaluation System (PPBES)—A structured procedure for determining policy in the allocation of resources for accomplishment of priority programs; it emphasizes long-range planning, analytic evaluative tools, and economic rationality in the setting of goals and objectives and in the determination of programs.

Policy—A governing principle, plan, or guide for a course of action.

Policy Development—The formulation of governing principles, plans, or guides for courses of action.

Portable Building—A building designed and constructed so that it can be transported to another location with or without dissasembling. (III M)

Present Worth—Current replacement cost of a piece of property less the deduction for depreciation. (III)

Primary Grades—The elementary grades preceding the intermediate grades, usually grades 1, 2, and 3. (VI)

Professional—A term denoting the level of personnel who have had extensive training in a particular line of work (usually a minimum of a bachelor's degree) and who perform activities regarded as professional by the laws and regulations established by the State or other professional requirements recognized by the State. Examples are superintendents, teachers, architects, lawyers, and nurses.

Professional Leave—Leave granted to employees, generally with all or part of their salary paid, for the purpose of professional improvement.

Program of Studies—A combination of related courses or self-contained classes organized for the attainment of specific educational objectives, e.g., a program of special education for handicapped pupils, a college preparatory program, an occupational program (in a given occupation or cluster of occupations), a general education program, or a transfer program. (VI)

Program-Oriented Budgeting—The preparation of a budget which emphasizes categorization by programs and reflects consideration of present and future costs of these programs. It is more narrow in scope than a planning-programing-budgeting-evaluation system (PPBES) in that it does not include such factors as systematic planning and evaluation procedures and multi-year perspectives.

Property Accounting—Maintenance of a set of records under which is recorded specific information about land, buildings, and equipment. (III M)

Proration—The allocation of parts of a single expenditure to two or more different accounts. The allocation is made in proportion to the benefits which the expenditure provides for the respective purposes of program areas for which the accounts were established. Such allocation is based on objective measures, e.g., time, floor area, number of pupils, and quantity consumed. (II)

Public Ownership—Proprietorship by a governmental agency.

Public Relations—Activities concerned with establishing, maintaining, and improving the relations among various elements of the State educational system, and between the educational system and its environment, through personal contact and the use of all information media.

Public School—A school operated by publicly elected or appointed school officials in which the program and activities are under the control of these officials and which is supported primarily by public funds. (VI)

Pupil—As used in this handbook, an individual for whom instruction is provided in an educational program under the jurisdiction of a school or school system. No distinction is made between the terms "pupil" and "student"; the term "pupil" is used to include individuals at all instructional levels. A pupil may receive his instruction in a classroom or a school plant or in another location such as his home or a

hospital. Instruction may be provided by direct teacher contact or by some other approved means such as television and correspondence. (V)

Pupil Accounting—A system for collecting, computing, and reporting information about pupils. (V)

Pupil Personnel Services—All services which are concerned with the welfare of pupils, e.g., guidance services, health services, school psychological services, audiology services, speech pathology services, attendance services, and school social work services. (VI M)

Pupil Transportation Services—Services concerned with transporting pupils to and from school, between schools, and to school-related activities, including acquisition, allocation, maintenance, and safe operation of equipment. (V M)

Purchase Order—A document which authorizes the delivery of specified merchandise or the rendering of certain services and the making of a charge for them. (II)

Purchased Services—Personal services rendered by personnel who are not on the payroll of the State agency, and other services which may be purchased by the State agency. *See also* CONTRACTED SERVICES.

Quarter Credit Hour—A unit of value, frequently used in higher education, indicating for a course the number of hours (or equivalency) of instruction per week for a school term of one quarter. A full-time college student making normal progress earns about 45 quarter credit hours in the academic year, three quarters constituting the work of the usual academic year. Quarter credit hours are converted to semester credit hours on the basis of 1 quarter credit hour equaling two-thirds of a semester credit hour. (IV M)

Real Estate—Land, improvements to site, and buildings; real property. (III)

Records—A collection of information which is prepared by a person, unit, or organization for the use of that person, unit, or organization. (V)

Regular Classroom—An instructional space which is designed, or adapted, in such a manner that it can be used to house any class that does not require special built-in equipment tailored to its specific needs. (VI M)

Regulation—As used in this handbook, a rule adopted by a State education authority and usually possessing the force of law under legislative sanction. Commonly used synonymously with "rule."

Report—A collection of information which is prepared by a person, unit, or organization for the use of some other person, unit, or organization. (V)

Reporting Period—A period of time for which a report is prepared (e.g., calendar year, school year, regular school term, summer school term, semester, or marking period). (VI)

Resources—As used in this handbook, money, materials, or services which may be available to a local or intermediate basic administrative unit by or through the State education agency.

Responsibility-Oriented Budgeting—A plan of financial operation expressed in terms of the allocation to each organizational unit within the department. The word "location" is sometimes used to refer to the organizational unit.

Retirement System—A plan by which staff members, because of disability or age, or having rendered a specified number of years of service as required by law or regulation, are required or permitted to leave the employment of a school system or of the State, usually with a guaranteed income for life. (IV M)

Retrieval of Information—Locating and recovering information from wherever it may be stored. (V)

Revolving Fund—A fund provided to carry out a cycle of operations. Amounts expended from the fund are restored from earnings from operations or by transfers from other funds so that it remains intact either in the form of cash, receivables, inventory, or other assets. These funds are also known as reimbursable funds. (II)

Sabbatical Leave—For definition *see* PROFESSIONAL LEAVE.

163

School—A division of the school system consisting of a group of pupils composed of one or more grade groups, organized as one unit with one or more teachers to give instruction of a defined type, and housed in a school plant of one or more buildings. More than one school may be housed in one school plant, as is the case when the elementary and secondary schools are housed in the same school plant. (V)

School Attendance Area—The geographic area which is served by a school. It does not necessarily constitute a local taxing unit and likewise it does not necessarily have an independent system of administration. Attendance areas for elementary schools may or may not be coterminous with attendance areas for secondary schools. (V)

School Bus—A vehicle with a manufacturers rated seating capacity as prescribed by law.

School Census—An enumeration and collection of data, as prescribed by law, to determine the name, age, sex, and post office address of children and youth who reside in a given administrative unit and to secure other information deemed pertinent to education. (V)

School Census Age—The age span of children and youth included in the school census. (V)

School Day—That part of a calendar day when school is in session. (V)

School District—For definition *see* LOCAL BASIC ADMINISTRATIVE UNIT.

School District Reorganization—The changing of boundary lines of local or intermediate basic administrative units, the merging of existing districts, and the creation of new districts, under the provisions of State law.

School Finance—The systems, methods, and procedures whereby funds are provided for the support of education.

School Plant—The site, buildings, and equipment constituting the physical facilities used by a single school or by two or more schools sharing the use of common facilities. (VI)

School Site—The land and all improvements, other than structures, such as grading, drainage, drives, parking areas, walks, plantings, play courts, and playfields. (III)

School Social Work—Professional services for the assistance in the prevention and solution of personal, social, and emotional problems of pupils which involve family, school, and community relationships when such problems have a bearing upon the quality of the school work of the pupil. (IV M)

School Term—A prescribed span of time when school is open and the pupils are under the guidance and direction of teachers. (VI)

School Year—The 12-month period denoting the beginning and ending dates for school accounting purposes, usually from July 1 through June 30. (VI)

Self-contained Class—A class having the same teacher for all or most of the daily school session. (VI)

Semester Credit Hour—A unit which expresses quantitatively the content of a course at the college level. The college student making normal progress will earn about 30 semester hours in the academic year; two semesters constitute the work of the academic year. (IV M)

Service—As used in this handbook, those activities which provide some support or benefit to another person, agency, or institution.

Single Fund Accounting—As used in this handbook, a budgeting and accounting procedure for the State department of education through which all receipts and expenditures are handled in a single fund.

Sinking Fund—Money which has been set aside or invested for the definite purpose of meeting payments on debt at some future time. It is usually a fund set up for the purpose of accumulating money over a period of years in order to have money available for the redemption of long-term obligations at the date of maturity. (II)

Software—Programing systems, libraries, and other programing and nonhardware operating aids; sometimes extended to include all sales support provided by a computer manufacturer such as training, reference material, and installation planning.

Special Education—As used in this handbook, educational provisions which are different from those provided in the usual school program and are provided for exceptional pupils by specially qualified personnel. Special Education may be provided in special classes on a full-time or part-time basis; outside the school plant in the pupil's home, a hospital, a sanatorium, or a convalescent home; or in other appropriate settings. *See also* DIFFERENTIATED CURRICULUM. (VI)

Staff Accounting—The procedure of maintaining systematic records of pertinent information about staff members. (IV M)

Staff Member—As used in this handbook, a staff member in the State department of education is a person whose relationship with the State department meets all of the following criteria: (1) the person serves under the rules and regulations of the governing authority; (2) the person's assigned activities are under the direction and control of the governing authority, (3) the person is assigned to perform activities which provide a service for the State department of education or a program operated by the State department of education; and (4) the person is in an employee relationship with the State department of education recognized by law for such purposes as workmen's compensation coverage, Federal Insurance Contributions Act (FICA), and withholdings from salary or wage for income tax. (IV M)

Standard Terminology—Items of information (terms)—understood, accepted, and used nationwide—possessing the qualities of combinability, comparability, relatability, and discreteness in classification and definition.

State—As used in this handbook, this term applies to the 50 States, outlying areas, the Trust Territory of the Pacific Islands, and the District of Columbia.

State Aid—State funds provided by legislation or State Constitution for the support of education at the intermediate or local level.

State Board of Education—The legally constituted body having the major responsibility for the general supervision of elementary and secondary education in the State. This board may also have total or partial responsibility for the supervision of higher education. (I M)

State Department of Education—An organization, composed of the chief executive officer (chief State school officer) and staff, that exists to conduct the work delegated to it by law.

State Education Agency—The organization established by law for the primary purpose of carrying out at least a part of the educational responsibilities of the State. It is characterized by having statewide jurisdiction and may be composed of a State board, chief executive officer, and staff. Some State education agencies may lack one or two of these three elements, but in any case there must be either a board or a chief executive officer. The term "commission" is sometimes used synonymously with "board." (IV)

State Education Authority—An organized and officially constituted group of individuals or an individual responsible for policy decisions related to constitutional and legislative provisions pertinent to education in the State.

State Operated—A term applying to any program, school, or other institution operated by a State agency.

State System of Education—The system which encompasses all educational activities within a State.

Statistical Services—Services concerned with collecting, organizing, summarizing, analyzing, and disseminating educational data pertinent to various educational interests, including pupils, staff, instruction, facilities, and finance.

Statistician—A staff member employed in the area of statistical services; an expert or specialist in statistics;

a person who assembles, classifies, and tabulates statistical data.

Stores—Supplies, materials, and equipment.

Subject Matter Area—A grouping of related subjects or units of subject matter under a heading such as English (language arts), foreign languages, music, natural sciences, industrial arts, home economics, agriculture, business, physical education, and trades and industrial occupations. (VI)

Supplies—Material items of an expendable nature that are consumed, worn out or deteriorated in use; those that lose their identity through fabrication or incorporation into a different or more complex unit or substance. (VI M)

Supporting Services—As used in this handbook, activities within the State department of education that are not limited to one organizational unit of the department but rather are departmentwide in scope.

Surplus—As used in the financial sense, the excess of the assets of a fund over its liabilities; or, if the fund also has other resources and obligations, the excess of resources over obligations. The term should not be used without a properly descriptive adjective unless its meaning is apparent from the context. (II)

Systems—Activities or services which provide for an orderly arrangement of data and procedures which will produce any desired interrelationship or summation which may be pertinent to recording or decision-making.

Systems Analysis—Activities involving the search for an evaluation of alternatives which are relevant to defined objectives, based on judgment, and, wherever possible, on quantitative methods; the development of data processing procedures or application to electronic data processing equipment.

Target Group—A group in the population at which programs are aimed or on which programs have a significant impact. *See also* DIFFERENTIATED CURRICULUM.

Teacher—A staff member performing assigned professional activities in guiding and directing the learning experiences of pupils in an instructional situation. (VI)

Teacher Aide—A staff member performing assigned activities of a nonteaching nature which are *not* classified as professional educational, but which assist a staff member to perform professional educational teaching assignments. (VI)

Teacher Training Institution—A college or university recognized by the proper State authorities for the training of teachers.

Technical Institute—An institution, or a division of an institution, offering instruction primarily in one or more of the technologies at the postsecondary instructional level. (VI)

Technical Personnel—Personnel working in one or more branches of technology at a level above the skilled trades and below professional status. (V M)

Telecourse—A full sequence of lessons offered over closed circuit or broadcast television for credit or for auditing purposes. Telecourse instruction may also include written work requirements, reading assignments, and examinations. (VI)

Tenure Status—The employment status of the staff member whose employment is not subject to discontinuance by the governing authority except in stipulated circumstances. (IV)

Textbooks—Books obtained primarily for use in certain classes, grades, or other particular student groups rather than for general school use. (III)

Training—A planned and systematic sequence of instruction under competent supervision designed to impart predetermined skills, knowledge, or abilities with respect to designated occupational objectives, and, in addition to occupational training, may include, to the extent necessary, adult basic education, prevocational training, and refresher and reorientation training for professionals. (VI M)

Transfers—In the financial accounting sense, money which is taken from one fund under the control of the State department of education and added to another fund under the department's control. Such

transfers are not receipts or expenditures of the department. (II M)

Tuition—An amount of money charged by a school system or educational institution for instruction for a given period of time, not including special charges such as for books and laboratory fees. (V)

Tuition Pupil—A pupil for whom tuition is paid. (V)

Undivided High School—A secondary school served by one faculty organized under one principal, which includes more than four grades as in a 6-6 or 7-5 plan, is not divided on a junior or senior basis, and is not preceded by a junior high school in the same school system. (V)

Ungraded Class—A class which is not organized on the basis of grade and has no standard grade designation. This includes regular classes which have no grade designation, special classes for exceptional pupils which have no grade designation, and many adult education classes. Ungraded classes sometimes are referred to as "nongraded." (VI M)

University—A postsecondary institution which typically comprises one or more colleges and one or more graduate professional schools. *See also* COLLEGE.

Upper Elementary Grades—The elementary grades following the intermediate elementary grades, usually grades 7 and 8 in an 8-4 organizational pattern. (VI)

Vocational-Technical Education—Education in one or more semiskilled, skilled, or technical occupations, provided by a school which is separately organized under the direction and management of an administrator (such as a principal). (VI M)

Work-study Program—A school program designed to provide employment for students who could not continue in school without the financial support provided through a job. The employment may or may not be curriculum related. *(Cooperative Programs* provide work experiences specifically related to the student's instructional program. The student's on-the-job training is an integral part of his total school curriculum.)

167

INDEX

A

Accountability, 140

Accounting, 21, 140

- cost, 143
- financial, 21, 31, 63, 100, 112, 145
- memorandum, 148
- property, 101, 150
- pupil, 151
- staff, 153

Accounts

- balance sheet, 63
- payable, 63, 140
- receivable, 63, 140

Accreditation, 23, 103, 114

Accrual basis, 140

Accrue, 140

Accrued

- expenses, 140
- interest, 140
- liability, 140
- revenue, 140

Achievement, pupil, 12, 90

Activities, 140

- cocurricular, 15, 95, 142

Administration, 16, 97, 140

- and management, 12, 90

Administrative action, 140

Administrative unit, 140

- intermediate, 16, 17, 97, 98, 147
- local basic, 16, 17, 97, 98, 148
- State, 153

Adult education, 6, 7, 14, 26, 92, 108, 140

Advisory council, 140

Agencies

- governmental, 146
- other State governmental, 7, 9, 84, 86
- State education, 2, 7, 84, 153

Aggregate days attendance, 140

Agriculture, 14, 93

Aid

- categorical, 142
- federal, 19, 64, 66, 99
- general, 146
- State, 19, 64, 66, 99, 153

Aide, teacher, 154

Analysis, systems, 154

Apparatus, 60, 130, 136, 140

Appraisal, 141

Appropriation, 141

Approval

- of programs and schools, 23-27, 102-108

Area

- general, 14, 91
- gross floor, 55, 132
- subject matter, 14, 92, 154

Art, 14, 25, 93, 106

Arts

- dramatic, 26, 107
- graphic, 21, 31, 102, 113, 146

168

Assignment

classification, 30-32, 110-115
scope of, 33, 115-116

Attendance, 141

aggregate days, 140
average daily, 141
center, 141
day of, 144

Attribution, 141

Audiovisual

aids, 141
services, 16, 95

Audit, 21, 101

Authority

governing, 146
spending, 141
State education, 7-9, 84-87, 153

Average

daily attendance, 141
daily membership, 141

B

Balance sheet, 63, 141

accounts, 63

Benefits, employee, 64, 65, 145

Bilingual education, 14, 92

Birth

date of, 28, 109
place of, 28, 109

Bond discount, 141
Books, library, 147

Budget, 21, 101, 141

flow-through, 146
program-oriented, 150
responsibility-oriented, 151
review, 8, 26, 86, 107

Building, 53, 65, 129

adequacy of, 59, 135
anticipated useful life of, 54, 131
availability of, 54, 131
cost of, 55, 132
date of disposal, 54, 131
dates of acquisition, 54, 130
design life of, 54, 131
gross floor area, 55, 132
identification of, 53, 129
location of, 53, 129
mobile, 55, 131
ownership of, 53, 130
permanent, 55, 131, 149
portable, 150
type of construction, 54, 131
use of, 53, 129

Business, 14, 93

C

Capital outlay, 142

buildings, 53, 65, 80, 81, 129
equipment, 60-62, 65, 135-138, 145
sites, 50-52, 126-129

Cataloging, 142

Category, 64

Categorical aid, 142

Centers for demonstration
and innovation, 13, 90

Certificate, 142

endorsement, 142
of high school equivalency, 142

Certification, 24, 104-105, 142

Charter, 23, 103-104

Chartering, 23, 103-104

Chief State school officer, 87, 142

Citizen, 29, 109

Civil, 142

  defense, 26, 107, 142
  rights, 142

Classification

  assignment, 30-32, 110-115
  major, 4

Classroom, 142

  regular, 151

Clerical

  assignment, 32, 34, 115, 117
  personnel, 142

Cocurricular activities, 15, 95, 142

College, 26, 108, 142

  community, 143
  junior, 26, 108, 147

Commission, 143

Commodities, surplus, 19, 99

Community, educational, 145

Comprehensive

  high school, 143
  research, 12, 90

Computer programing, 143

Conferences, 11, 17, 89, 98

Constitutional provisions for education, 2

Consultant, 30, 74, 75, 112, 143

Consultative, 143

  services, 14-18, 91-98

Continuing

  contract, 39, 120, 143
  education, 143

Contracted services, 143

Contractual status, 39, 120

Controller, 143

Cooperative programs, 155

Coordination, 143

  internal, 10, 87
  with nongovernmental agencies, 10, 88
  with other State agencies, 10, 88

Correctional school(s), 26, 108, 143

Cost(s)

  accounting, 143
  benefit, 143
  center, 143
  direct, 145
  effectiveness, 144
  indirect, 100, 147
  of building, 55, 132
  of equipment, 60, 137
  of site, 52, 129

Course, 144

  of study, 144

Credential, 41-44, 121-124, 144

Credit, 144

  course, 144
  letter of, 147

Cultural programs, 25, 106

Curriculum, 144

- differentiated, 14, 92, 145
- guide, 144
- research, 12, 90

D

Data

- bank, 144
- processing, machine, 4, 17, 19, 30, 97, 100, 102 112, 148
- systems, 19, 21, 100, 102

Date of birth, 28, 109

Day

- of attendance, 144
- in session, 144
- school, 152

Debt service, 65, 144

Defense, civil, 26, 107, 142

Degree, 144

- bachelor's, 41, 122
- doctor's, 41, 122
- master's, 41, 122
- other second-level, 41, 122

Demographic studies, 145

Demonstration, 145

- centers, 13, 90

Development, 12, 90, 145

- of policies, 8-10, 85-87, 150

Differentiated curriculum, 14, 92, 145

Dimensions, 64

Direct costs, 145

Disbursements, 145

Dissemination of information, 13, 90, 145

Distribution of resources, 19-20, 98-100

Double entry, 145

Driver education, safety and, 15, 94

Drug education, 16, 95

Dual enrollment, 145

E

Early childhood education, 145

Education

- adult, 6, 7, 14, 26, 92, 108, 140
- bilingual, 14, 92
- community, 145
- continuing, 143
- distributive, 14, 93
- drug, 16, 95
- early childhood, 145
- environmental, 15, 95
- health occupations, 15, 93
- higher, 7, 84, 146
- Indian, 147
- inservice, 45, 124, 147
- migrant, 14, 92, 148
- safety and driver, 15, 94
- special, 153
- State board of, 2, 7, 84, 153
- State department of, 10, 87, 153
- State system of, 153
- technical, 15, 94
- urban, 14, 92
- vocational-technical, 155

Educational

background and credential information, 41-44, 121-124
community, 145
media, 16, 25, 31, 95, 106, 113, 145

Electronic and electromechanical, 60, 136

computer, 60, 136
radio, 16, 25, 60, 96, 106, 136
television, 16, 25, 60, 96, 106, 136

Elementary, 6, 7, 14, 26, 91, 107

Employee benefits, 64, 65, 145

Encumbrances, 145

Endowment fund, 145

English, 15, 93

Enrollment, dual, 145

Environmental education, 15, 95

Equipment, 60, 135, 145

adequacy of, 62, 138
anticipated useful life of, 61, 137
assignment of, 62, 138
cost of, 60, 137
date of acquisition, 60, 137
design life of, 61, 137
group control of, 60, 137
kinds of, 60, 135
ownership of, 60, 137
purpose for which used, 61, 138
unit control of, 60, 137

Evaluation, 13, 17, 30, 91, 97, 111

interagency, 13, 91
intra-agency, 13, 91

Expenditures, 64-66, 145

Exploration, occupational, 15, 95

External, 145

F

Federal

aid, 19, 64, 66, 99
funds, 19, 64, 99
grants, 19, 64, 99

Fees, 64, 145

Fellowships, 11, 17, 25, 89, 98, 105

Financial accounting, 21, 31, 63, 100, 112, 145

Financing, 8, 12, 86, 90

Fiscal

management, 17, 21, 97, 100
period, 146

Floor area, gross, 55, 132

Flow-through

budget, 146
funds, 82-83, 98

Foreign languages, 15, 93

Foundation program, 82-83, 146

Full-time staff member, 39, 119, 146

Function(s), 7, 10, 84, 87, 146

Fund(s), 146

endowment, 145
federal, 19, 64, 99
flow-through, 82-83, 98
sinking, 152
State, 19,99

G

General

aid, 146
area, 14, 91

172

ledger, 63, 146
management, 2, 10-11, 87-89

Gifted, education for the, 14, 92

Governmental agencies, 146

Grade, 146

Graduate study, 146

Grants and subsidies, 65, 76-77, 82-83

Graphic arts, 21, 31, 102, 113, 146

Gross floor area, 55, 132

Group control, 60, 137

Guidance, 16, 96

Guide, curriculum, 144

H

Handbook series, 1, 139

Handicapped, education for the, 14, 92

Health

and safety in daily living, 15, 93
occupations education, 15, 93
services, 16, 96

High school

comprehensive, 143
junior, 147
junior-senior, 147
undivided, 155

Higher education, 7, 84, 146

State board for, 2, 7, 84, 153

Home economics, 15, 93

Honors, 25 105

Hospital school, 26, 108

Hour

quarter credit, 123, 151
semester credit, 42-43, 123, 152

Humanities, 15, 95

Human rights, 10, 88, 146

I

Identification

of building, 53, 129
of site, 50, 127
of State education authority, 7, 84, 153

Immunization information, 36, 118

Implementation, 146

Incomplete high school, 147

Indian education, 147

Indirect costs, 100, 147

Individualized instruction, 16, 95

Industrial arts, 15, 94

Information

dissemination of, 13, 90, 145
performance, 49, 126
retrieval of, 151
services, 22, 31, 102, 114

Inservice education or training, 45, 124, 147

Institutes, 11, 17, 89, 98

Institutional, 147

Instruction, individualized, 16, 95

Instructional

consultative services, 14, 91
level, 5-7, 147

Interagency, 12, 13, 89, 91

evaluation, 13, 91
planning, 12, 89

Interdisciplinary study and activities, 15, 94

Interest, 65

Intermediate

administrative unit, 16, 17, 97, 98, 147
elementary grades, 147

Internal services, 21-22, 100-102, 147

Internships, 11, 17, 25, 89, 98, 105

Intra-agency, 12, 13, 89, 91

evaluation, 13, 91
planning, 12, 89

J

Judiciary, 8, 10, 86, 88

activities, 147

Junior

college, 26, 108, 147
high school, 147

Junior-senior high school, 147

K

Kindergarten, 147

Kinds of equipment, 60, 135

L

Land

and buildings, 65
ownership of, 51, 128

Languages, foreign, 15, 93

Leave information, 47, 126

annual, 47, 126
maternity, 47, 126
military, 47, 126
personal, 47, 126
professional, 11, 17, 24, 89, 98, 105, 150
sabbatical, 47, 126, 151

Legal and legislative, 17, 31, 98, 113

Legal name, 28, 109

Legislative liaison, 10, 31, 88, 113

Letter of credit, 147

Level of detail, 4-5, 64

Liaison, legislative, 10, 31, 88, 113

Library, 25, 31, 106, 113

books, 147
professional, 21, 101

License, 103, 148

Licensing, 23-24, 32, 103-104, 114

Line-item structure, 148

Local

basic administrative unit, 16, 17, 97, 98, 148
education agency, 148

Location, 66-83, 148

of buildings, 53, 129
of sites, 50, 127

M

Machine data processing, 4, 17, 19, 30, 97, 100, 102, 112, 148

Machinery, 60, 136, 148

Mail control, 21, 31, 101, 113

Major, 148

  function, 2, 64, 148

Management, 148

  fiscal, 17, 21, 97, 100
  general, 2, 10-11, 87-89
  information system, 13, 17, 19, 21, 30, 91, 97, 100, 111, 148
  of consultative services, 14, 91
  of distribution of resources, 19, 99
  of internal services, 21, 100
  of operation or approval of programs and schools, 23, 102
  of planning, research, development, and evaluation, 12, 89
  personnel, 17, 21, 97, 101
  property, 21, 101
  records, 22, 31, 102, 113

Marital status, 35, 117

Material, 148

  instructional, 19, 99

Mathematics, 15, 94

Media, educational, 16, 25, 31, 95, 106, 113, 145

Membership, 148

  average daily, 141

Memorandum accounting, 148

Middle school, 5, 148

Migrant education, 14, 92, 148

Military service status, 29, 109

Minor, 42, 123, 149

Motivational training, 17, 98

Multidimensional approach, 64

Municipal, 51, 53, 128, 130

Museum, 26, 50, 53, 107, 127, 130

Music, 15, 25, 94, 107

N

Nation of citizenship, 29, 109

Natural sciences, 15, 94

Negotiations, 8, 86

Noncitizen, 29, 109

Noncredit course, 149

Nongovernmental agency, 10, 88, 149

Nonprofessional, 65, 149

  certification and licensing, 24, 104-105
  personnel, 24, 104-105, 149
  salaries and benefits, 65, 72-73

Nonpublic

  ownership, 51, 54, 61, 128, 130, 138
  school, 23-24, 103-104, 149

O

Object, 64-65, 149

Obligations, 149

Occupational exploration, 15, 95

Office occupations, 15, 94

On-the-job training, 25, 106, 155

Operation or approval of
programs and schools, 2, 23-27, 102-108

Organizational unit, 66, 149

Organizations

honorary, cultural, and civic, 45, 125
professional, 45, 125

Original site, 51, 128

Out-of-State, 33, 116

Outlay, capital, 142

Ownership

nonpublic, 51, 54, 61, 128, 130, 138
of building, 54, 130
of equipment, 61, 138
of site, 54, 130
public, 51, 53, 61, 128, 130, 137, 150

P

Paraprofessional, 24, 104-105, 149

Part-time staff member, 39, 119

Per diem, 40, 121, 149

Performance information, 49, 126

Period

fiscal, 146
reporting, 151

Permanent building, 55, 131, 149

Personnel, 149

clerical, 142
management, 17, 21, 97, 101
nonprofessional, 24, 104-105, 149
professional, 24, 104-105, 150

Petty cash, 149

Physical

disability or limitation, 36, 118
examinations, 36, 118
health information, 36, 118

Place of birth, 28, 109

Planning, 12, 17, 30, 89, 97, 111, 150

interagency, 12, 89
intra-agency, 12, 89

Planning, programing, budgeting,
and evaluation system, 63, 150

Policy, 150

development, 8-10, 85-87, 150
implementation, 10, 87

Portable building, 150

Postsecondary, 6, 7, 14, 92

Preprimary grades, 6

Present worth, 150

Primary grades, 6, 150

Processing, machine data, 4, 17, 19, 30, 97, 100,
102, 112, 148

Professional, 150

leave, 11, 17, 24, 89, 98, 105, 150
library, 21, 101
personnel, 24, 104-105, 150

Program(s), 6, 65-83

cooperative, 25, 106, 155
cultural, 25, 106
foundation, 82-83, 146
level, 5-6, 7, 65-83
of studies, 150
pupil scholarship and assistance, 25, 105

specific, 5-6, 7, 65-83
State education agency, 2
work-study, 25, 106, 155

Programing, computer, 143

Program-oriented budgeting, 150

Property

accounting, 101, 150
surplus, 19, 99
utilized by State education authority
or State education agency, 50-62, 126-138

Proration, 150

Public

ownership, 51, 53, 61, 128, 130, 137, 150
relations, 10, 88
school, 150

Publications, 22, 31, 102, 113

Pupil, 150

accounting, 151
achievement, 12, 90
personnel services, 16, 96
transportation services 17, 97, 151

Purchase order, 151

Purchased services, 65, 76-77, 151

Purchasing, 21, 31, 101, 112

Q

Quarter credit hour, 123, 151

R

Race, 28, 109

Radio in education, 16, 25, 96, 106

Reading, 93

Real estate, 151

Records, 151

management, 22, 31, 102, 113

Regional, 33, 116

Regular classroom, 151

Regulation, 151

Remote system, 58, 134

computer terminal, 58, 134
radio, 58, 134
telephone, 58, 134
teletype, 58, 134

Reorganization, school district, 17, 97, 152

Report, 151

Reporting period, 151

Research, 12, 90

comprehensive, 12, 90
curriculum, 12, 90
specific, 12, 90

Residence information, 35, 117

Resources, 151

Responsibility-oriented budget, 151

Retirement

compulsory, 47, 126
system, 47, 126, 151
voluntary, 46, 125

Retrieval of information, 151

Revenue

classification of, 63
source of, 64, 66-83

Review, budget, 8, 26, 86, 107

Revolving fund, 151

Rights

civil, 142
human, 10, 88, 146

S

Sabbatical leave, 47, 126, 151

Safety and driver education, 15, 94

School, 152

attendance area, 152
bus, 152
census, 152
census age, 152
comprehensive high, 143
correctional, 26, 108, 143
day, 152
district, 152
district reorganization, 17, 97, 152
finance, 152
food services, 17, 97
for the blind, 26, 107
for the deaf, 26, 107
for the mentally retarded, 26, 107
hospital, 26, 108
junior high, 147
junior-senior high, 147
library services, 16, 95
middle, 5, 148
nonpublic, 23-24, 103-104, 149
plant, 152
public, 150
site, 152
social work, 16, 96, 152
term, 152
undivided high, 155
year, 152

Scholarships, 25, 105

Scope of assignment, 33, 115-116

Secondary, 6, 7, 14, 26, 91, 107

Self-contained class, 152

Semester credit hour, 42-43, 123, 152

Service(s)

audiovisual, 16, 95
consultative, 14-18, 91-98
contracted, 143
debt, 65, 144
editorial, 22, 102
food, 17, 97
guidance, 16, 96
health, 16, 96
information, 22, 31, 102, 114
internal, 21-22, 100-102, 147
military, 29, 109
pupil personnel, 16, 96
pupil transportation, 17, 97, 151
purchased, 65, 76-77, 151
school attendance and social work, 16, 96
school library, 16, 95
school psychological, 16, 96
speech pathology, 16, 96
statistical, 13, 19, 21, 91, 100, 102, 153
supporting, 154
warehouse, 50, 127

Sex, 28, 109

Single fund accounting, 152

Sinking fund, 152

Site

area of, 52, 129
cost of, 52, 129
date of disposal, 51, 128
dates of acquisition, 51, 128
identification of, 50, 127
location of, 50, 127
ownership of, 51, 128
use of, 50, 127

Social

sciences, 15, 94

studies, 15, 94
work, 16, 96, 152

Software, 153

Special education, 153

Specific program(s), 5-6, 7, 65-83

Staff

accounting, 153
member, 153

Standard terminology, 153

State, 153

aid, 19, 64, 66, 99, 153
board for higher education, 2, 7, 84, 153
board for vocational education, 7, 84
board for vocational rehabilitation, 7, 85
board of education, 2, 7, 84, 153
department of education, 10, 87, 153
education agency, 2, 7, 84, 153
education authority, 7-9, 84-87, 153
health board or commission, 7, 85
labor board or commission, 7, 85
operated, 153
system of education, 153
welfare board or commission, 7, 85

Statistical services, 13, 19, 21, 91, 100, 102, 153

Statistician, 153

Status

contractual, 39, 120
marital, 35, 117
service or employment, 39, 119
tenure, 39, 120
time, 39, 119

Stores, 154

Subject matter area, 14, 92, 154

Subsidies, grants and, 65, 76-77, 82-83

Supplies, 65, 154

Supporting services, 154

Surplus, 154

commodities, 19, 99
property, 19, 99

System(s), 154

analysis, 154
data, 19, 21, 100, 102
management information, 13, 17, 19, 21, 30, 91, 97, 100, 111, 148
planning, programing, budgeting, and evaluation, 63, 150
remote, 58, 134
retirement, 47, 126, 151
television, 58, 135

T

Target group, 14, 92, 154

Teacher, 154

aide, 154
education improvement, 23, 103
training institution, 154

Technical

institute, 154
personnel, 154

Telecourse, 154

Telephone, 58, 134

Teletype, 58, 134

Television

in education, 16, 25, 96, 106
system, 58, 135

Tenure status, 39, 120

Terminal, computer, 58, 134

Termination

information, 46, 125
involuntary, 47, 125
voluntary, 46, 125

Textbooks, 19, 99, 154

Time status, 39, 119

full-time 39, 119
part-time 39, 119

Trade and industrial occupations, 15, 94

Traineeships, 11, 17, 25, 89, 98, 105

Training, 154

inservice, 45, 124, 147
motivational, 17, 98
preservice orientation and, 11, 17, 24, 89, 98, 105

Transfers, 65, 154

Transportation

pupil, 25, 106
services, 17, 97, 151

Tuition, 155

pupil, 155

U

Undistributed, 6, 7

Undivided high school, 155

Ungraded class, 155

Unit control, 135

University, 26, 108, 155

Upper elementary grades, 155

Urban education, 14, 92

Use

of building, 53, 129
of site, 50, 127

V

Vocational education

State board for, 7, 84

Vocational rehabilitation, 26, 107

State board for, 7, 85

Vocational-technical education, 155

Voluntary

retirement, 46, 125
termination, 46, 125

W

Warehouse, 50, 127

services, 50, 127

Workshops, 11, 17, 89, 98

Work-study program, 25, 106, 155

Y

Year

fiscal, 146
school, 152